10 Appendices

Appendix 1 Residential Survey

connecting communities

MARTIN WAY CORRIDOR

Residential Survey Summary

Task 2.f Deliverable

FINAL – April 1, 2021

1. Project Background

Martin Way is a major regional thoroughfare and corridor serving the communities of Olympia, Lacey, and Thurston County. The former state highway serves as the area's primary alternative to Interstate 5, has frequent transit service, and is home to a variety of business activity and destinations. It connects people throughout the region to homes, businesses, services, and recreation. Looking to the future, the corridor is forecasted to grow in importance as a strategic transportation link and business destination. The Martin Way Corridor Study will examine multimodal safety and mobility issues, and incorporate transportation, land use, environmental, and economic development considerations. This project is a joint planning study between Thurston Regional Planning Council, Thurston County, City of Olympia, City of Lacey, and Intercity Transit.

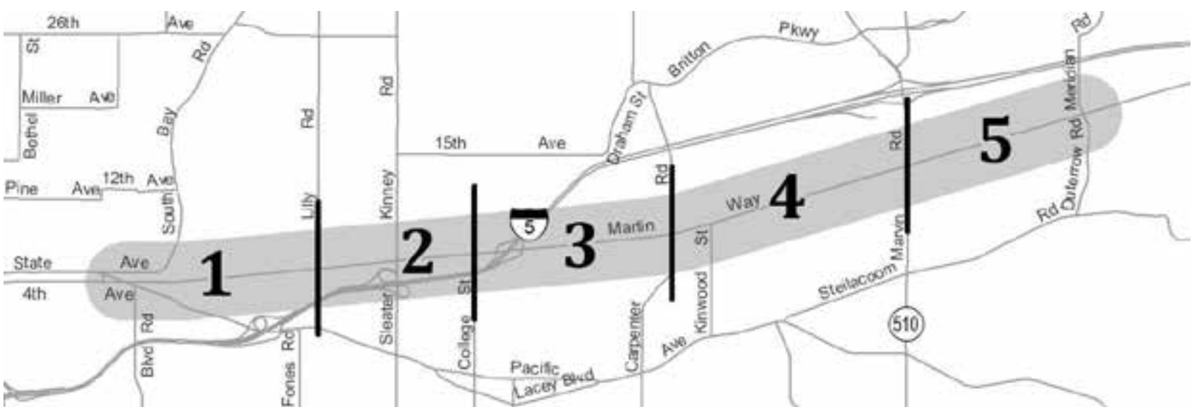

Figure 1. Map of the study area with numbered corridor segments

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The study area spans approximately 7.5 miles from where Martin Way and Pacific Avenue diverge in Olympia to its intersection with Dutterow and Meridian Road in the Lacey urban growth area. The corridor is broken into five segments (Figure 1, previous page):

- 1 - between Pacific Ave. and Lilly Rd.
- 2 - between Lilly Rd and College St.
- 3 - between College St. and Carpenter Rd.
- 4 - between Carpenter Rd. and Marvin Rd.
- 5 - between Marvin Rd. and Dutterow/Meridian Rd.

2. Survey Distribution & Response

In September 2020, TRPC administered a survey to learn more about the needs, concerns, and preferences among people who live along the corridor. Staff from the project partners developed the survey questionnaire collaboratively. The survey was mailed directly to 8,612 households within or near the corridor, and respondents could choose to reply either by returning the paper survey in a postage-paid envelope or by taking it online through the Survey Monkey platform. The online survey was promoted to other users of the Martin Way Corridor through:

- TRPC's homepage.
- Social media posts.
- GovDelivery message to riders of major bus routes along the corridor - Intercity Transit routes 65 62A, and The One.
- E-newsletter notice sent by the City of Olympia.

A total of 1,990 surveys (both online and paper) were returned.

The full survey sent to residents included 17 questions. In the online survey, those who identified themselves as not residing in the corridor area were asked a shorter subset of questions. The analysis below differentiates responses from corridor residents from other users of the corridor. See Appendix A for copies of the online and print versions of the survey.

3. Respondent Demographics

Question 1 asked about whether the respondent lived on the Martin Way corridor. Of the 1,686 responses received to this question, nearly half indicated they live on or near the corridor (Table 1, next page). One quarter work on or near the corridor, and another 22 percent often travel the corridor, though they don't live or work along it.

Table 1. Living on the Martin Way corridor

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Relationship to the Martin Way corridor	Respondents	
	Percent	Count
Martin Way Corridor residents	49%	818
Nonresidents	51%	868
I own residential property on or near the Martin Way Corridor, but don't live there.	2%	26
I work on or near the Martin Way Corridor	25%	429
I don't live or work along the Martin Way Corridor, but I often travel on Martin Way	22%	379
I live outside the Martin Way Corridor, and don't own property there	2%	34
Total Responses	**100%**	**1,686**
No Response	**--**	**304**

In addition to Question 1, Questions 15, 16, and 17 asked about who was responding to the survey. Most respondents were women, white, and have a household income of $50,000 or more.

Who responded to the survey?

Race/Ethnicity†...
nearly 9/10 were white

Live...
nearly 1/2 were corridor residents

Household Income...
nearly 3/4 earned $50,000 or more annually

Age*...
1/4 were 25-39, 1/3 were 40-54, & 1/3 were 55-69

Gender...
nearly 3/5 were women

Race/Ethnicity†...
3% American Indian & Alaska Native
6% Asian
4% Black or African American
4% Hispanic or Latino
2% Native Hawaiian & Pacific Islander
85% White
4% Other

Live...
48% are corridor residents
52% live elsewhere

Household Income§...
9% earned less than $24,999
14% earned $25,000 to $49,000
73% earned $50,000 or more
5% didn't know

Age*...
24 or younger
25-39
40-54
55-69
70 or older

Gender...
59% female
37% male
1% other

†Respondents could choose more than one answer.
§A typo on the online and paper survey did not include those that make between $49,001 and $49,999.
**Reflects only responses from the online survey; the question regarding a respondents' age was unintentionally left off the paper version of the survey.*

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4. Corridor Residents

Question 1 also asked residents where they live along the Martin Way corridor (Table 2). For respondents who indicated they lived on or near the Martin Way corridor, more than half (56 percent) live east of Carpenter Road.

Table 2. Where residents live on the Martin Way corridor

Question 1: Where do you live along the Martin Way Corridor (see map - choose closest area)?		
	Respondents	
Corridor Segment	**Percent**	**Count**
1 - between Pacific Ave. and Lilly Rd.	20%	149
2 - between Lilly Rd and College St.	12%	91
3 - between College St. and Carpenter Rd.	11%	83
4 - between Carpenter Rd. and Marvin Rd.	29%	219
5 - between Marvin Rd. and Dutterow/Meridian Rd.	27%	204
Total Resident Responses	**100%**	**746**
No Response	--	**71**

Comparing the survey returns to the estimated population in the corridor segments, people living in Segment 5 are under-represented in responding to the survey with just 27 percent of responses coming from an area that represents 36 percent of the total Martin Way Corridor population (Figure 2). Conversely, people living in Segment 3 are over-represented, making up 11 percent of the survey returns but only three percent of the Martin Way Corridor population.

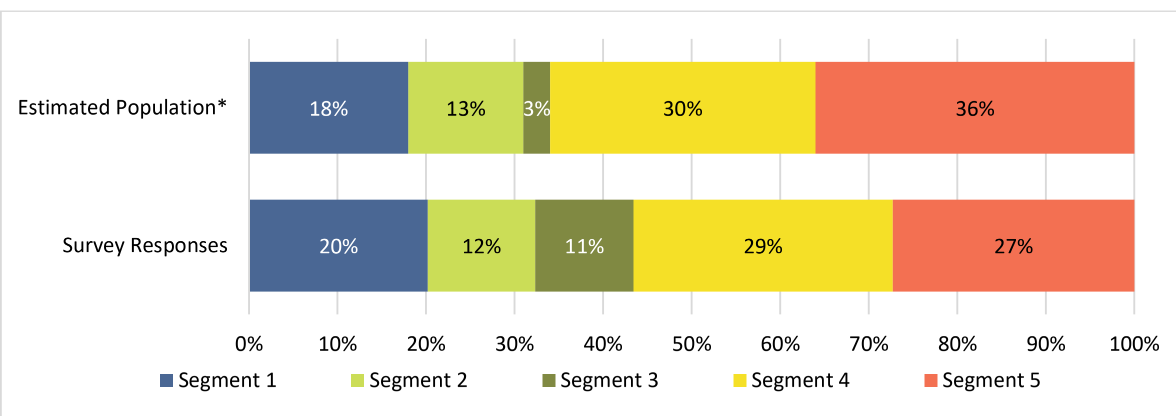

Figure 2. Comparing Martin Way survey resident responses to the corridor's estimated population
**Source: 2017 Population & Employment Forecast, Thurston Regional Planning Council*

Question 2 asked residents how long they have lived in their current location. Nearly half of all residents have lived in their current location for 10 or more years while only seven percent have lived in their current location for less than one year (Table 3).

Table 3. Residents' length of time living in current location along the Martin Way corridor

Question 2: How long have you lived in your current location?		
	Respondents	
Length of Time	Percent	Count
Less than 1 year	7%	53
1-2 years	12%	85
2-3 years	9%	63
3-4 years	6%	45
4-5 years	6%	41
5-10 years	14%	106
10 or more years	47%	348
Total Resident Responses	**100%**	**741**
No Response	**--**	**76**

For residents who answered Question 2 about which part of the corridor they live in, residents in Segment 2 (between Lilly Rd and College St.) are significantly more likely to have resided in their current location for five years or less (Table 4 and Figure 3, next page).

Table 4. Residents' length of time living in current location along the Martin Way corridor by corridor segment

Question 2: How long have you lived in your current location?						
	Residents of:					
Length of Time	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	Total Responses
Less than 1 year	13	4	4	16	16	53
1-2 years	10	17	7	25	26	85
2-3 years	15	9	11	6	22	63
3-4 years	10	9	5	9	12	45
4-5 years	10	9	7	7	8	41
5-10 years	28	19	7	30	22	106
10 or more years	62	24	42	123	97	348
Total Responses	**148**	**91**	**83**	**216**	**203**	**741**
No Response						**76**

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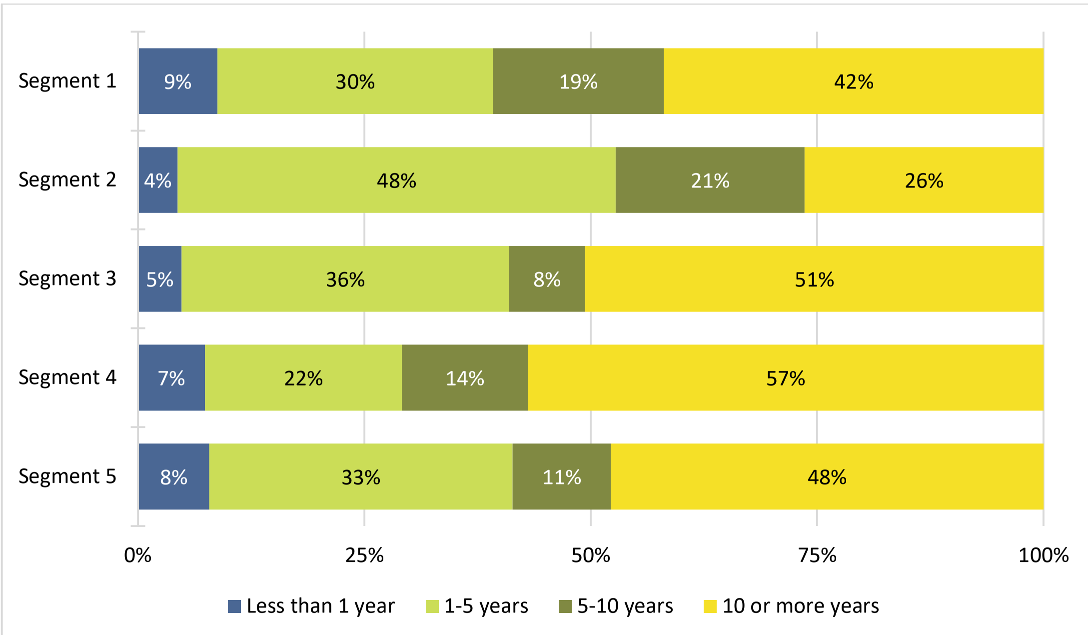

Figure 3. Residents' length of time living in current location along the Martin Way corridor by corridor segment
Segment 1 - between Pacific Ave. and Lilly Rd. | Segment 2 - between Lilly Rd and College St. | Segment 3 - between College St. and Carpenter Rd. | Segment 4 - between Carpenter Rd. and Marvin Rd. | Segment 5 - between Marvin Rd. and Dutterow/Meridian Rd.

Question 3 asked about residents' living situation (Table 5). Nearly three out of four residents are homeowners (71 percent) while only 28 percent are renters. None of the corridor residents indicated they are unhoused or experiencing homelessness, although eight people indicated they live with someone else.

Table 5. Household tenure on the Martin Way corridor

Question 3: My household:		
	Respondents	
Household Tenure	Percent	Count
Rents our home	28%	215
Owns our home	71%	570
Lives with someone else	1%	8
Is unhoused or unsheltered	0%	0
Total Resident Responses	**100%**	**793**
No Response	**--**	**24**

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Although 48 percent of the corridor is made up of households that rent, only 27 percent of respondents are renters (Figure 4).

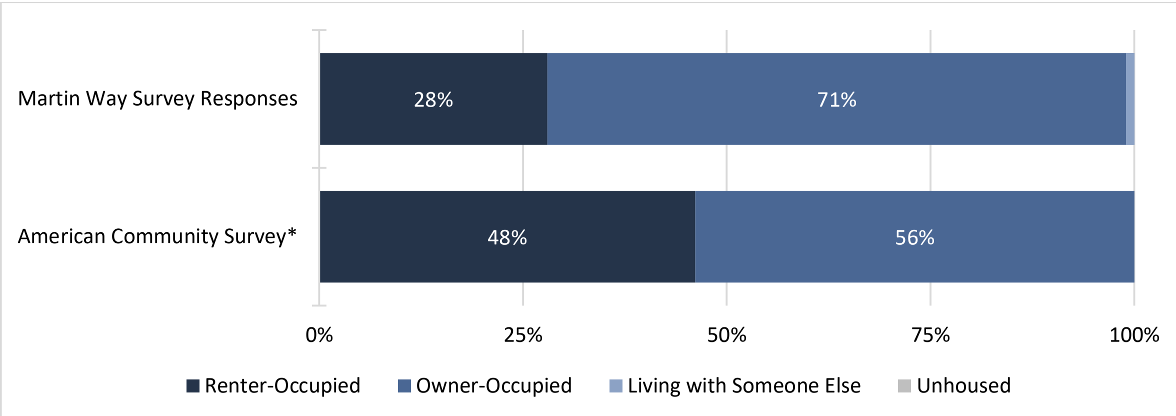

Figure 4. Comparing Martin Way survey resident responses to the American Community Survey
Source: US Census Bureau, 2014-2018 American Community Survey
** The ACS does not include options for households who live with someone else and those that are experiencing homelessness, so a direct comparison is not possible.*

Corridor residents were also asked about their work situation and could give more than one answer (Table 6 and Figure 5, next page).

Table 6. Where Martin Way corridor residents work

Question 4: Where do you work?		
	Respondents	
Work Location*	Percent	Count
At my home	14%	107
At a business or office located on the Martin Way Corridor	14%	103
At a business or office located elsewhere in Thurston County	25%	183
At Joint Base Lewis-McChord, active-duty military	3%	23
At Joint Base Lewis-McChord, civilian or contract position	2%	17
At a business or office located elsewhere in Pierce County	4%	27
At a business or office located somewhere else	7%	50
Retired	36%	266
Not employed	4%	28
Total Resident Responses	--	**744**
No Response	--	**73**

**Respondents could give more than one answer.*

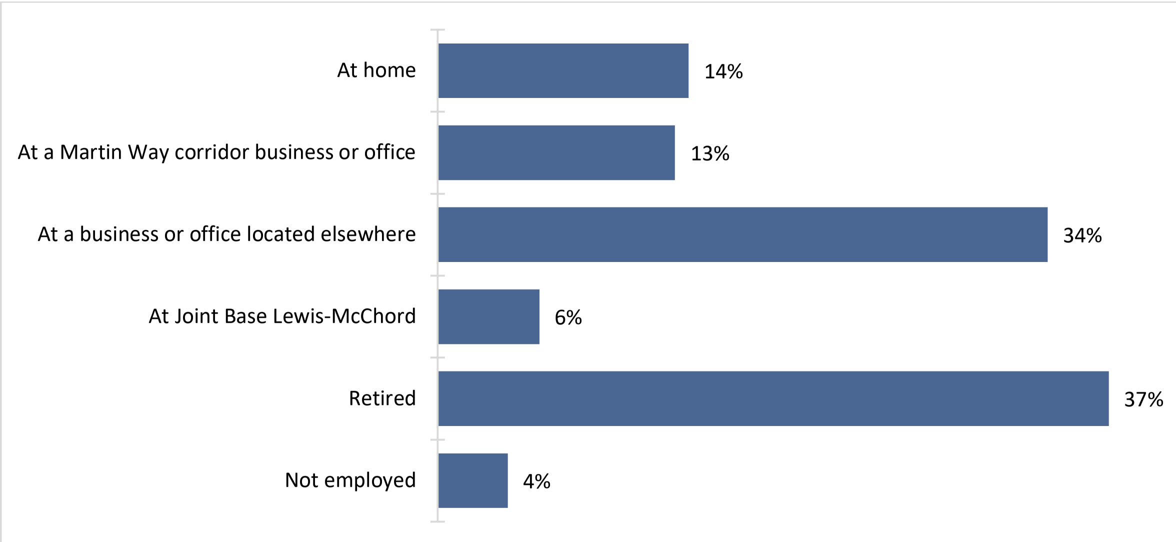

Figure 5. Where Martin Way corridor residents work. Respondents could give more than one answer.

Question 6 asked residents what they liked most about living on or near Martin Way (Figure 6). Many respondents appreciate the convenience and ease of access to Interstate 5 (I-5) and the corridor's businesses.

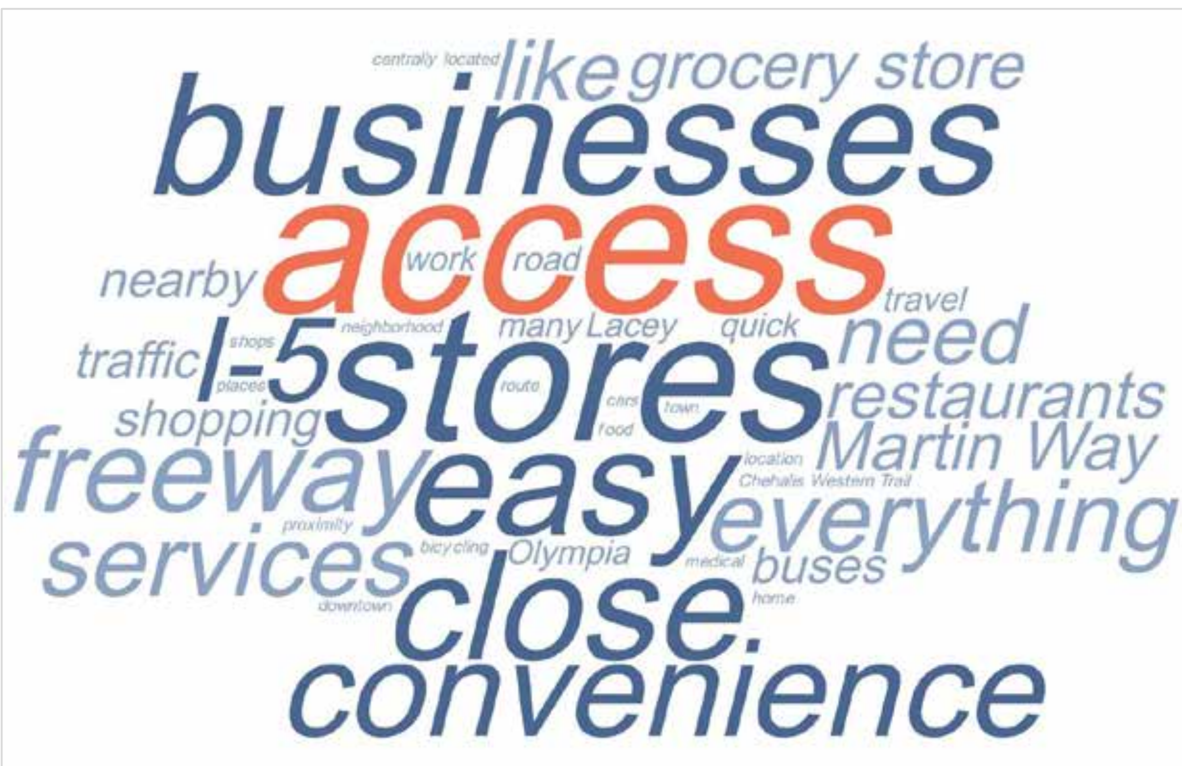

Figure 6. What do you like most about living on or near Martin Way?

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Question 7 asked residents what they would do to improve Martin Way (Figure 7). Many respondents want to see better signal timing to improve traffic flow and reduce stop-and-go traffic. Other concerns include addressing the homelessness impacting the corridor, adding bike lanes and trails, installing continuous sidewalks along Martin Way and other streets, addressing safety issues, and improving the overall look of the corridor – from maintaining landscaping to picking up trash to improving the look of businesses and buildings.

Figure 7. If you could do one thing to improve Martin Way, what would you do?

Question 9 asked residents about the businesses and services they need and how easy it is to access them (Table 7).

Table 7. Accessing businesses and services

Question 9: As a resident living near the Martin Way Corridor, tell us about the businesses and services you need, and how easy it is to get there.						
Response	Very hard to get to	Moderately hard to get to	Neutral	Moderately easy to get to	Very easy to get to	Total
Grocery stores/markets	18	105	72	292	306	793
Convenience stores	11	66	174	214	274	739
Specialty/ethnic markets	26	97	259	186	137	705
Pharmacies	17	75	150	259	252	753
Parks, trails, and public places to enjoy nature and open space	57	118	225	196	128	724
Schools	11	35	346	131	150	673
Hospital and doctors' offices	20	104	146	287	201	758
Restaurants	14	97	141	287	215	754
Coffee shops	10	65	194	229	217	715
Fitness clubs or places to work out	19	58	317	159	143	696
Social services (such as unemployment office)	41	69	406	72	58	646
Local businesses	14	104	149	304	168	739
Chain retailers (such as Target or Home Depot)	16	99	87	302	261	765
Different kinds of housing	25	41	391	94	88	639
Affordable housing	64	65	376	61	66	632
Entertainment (movies, etc.)	21	74	196	250	173	714
Total Resident Responses						**788**
No Response						**29**

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In Figure 8, responses were converted into percentages and placed on a scale of -100% to +100% where negative percentages indicate accessing a business or service is moderately or very hard and positive percentages indicate accessing a business or service is moderately or very easy. Neutral responses are not represented in Figure 8. In general, residents were more likely to indicate accessing a business or service is easy. Residents were more evenly split regarding accessing affordable housing and social services. About 22 percent of respondents indicated accessing parks, trails, and public places is either moderately or very hard to access.

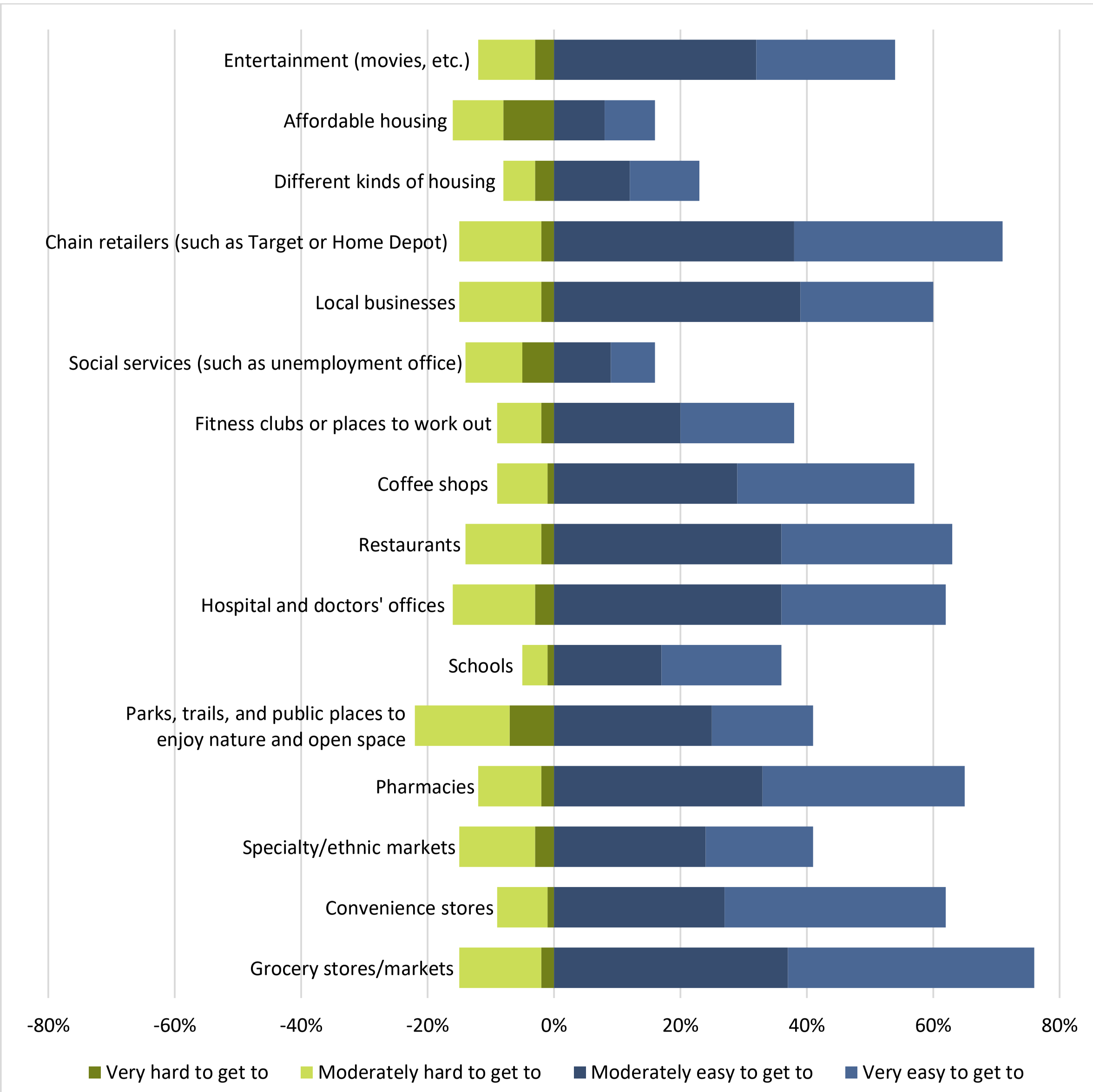

Figure 8. Accessing businesses and services. In the figure above, negative percentages indicate accessing a business or service is moderately or very hard and positive percentages indicate accessing a business or service is moderately or very easy. Neutral responses are not represented above.

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Question 10 asked residents about their level of satisfaction with 14 aspects of the corridor including how easy it is to walk or bike the corridor, the location of bus stops, how safe residents feel, etc. (Table 8).

Table 8. Level of satisfaction with 10 aspects of Martin Way

Question 10: As a resident living near the Martin Way Corridor, tell us how satisfied you are with aspects of the area.						
Answer Choices	**Very unsatisfied**	**Moderately unsatisfied**	**Neutral**	**Moderately satisfied**	**Very satisfied**	**TOTAL**
Ease of walking	114	188	202	177	93	**774**
Availability of sidewalks	137	198	166	173	92	**766**
Availability of crosswalks	107	174	207	193	82	**763**
Ease of biking	80	147	346	88	51	**712**
Availability of bike lanes	71	149	336	103	58	**717**
Availability of trails	105	175	265	110	67	**722**
Frequency of bus service	48	51	428	105	80	**712**
Location of bus stops	51	63	411	112	81	**718**
Ease of walking to bus stops	70	76	380	111	79	**716**
Amount of trash or litter	222	247	137	124	29	**759**
Sense of safety	162	262	149	171	41	**785**
Level of crime	129	247	223	127	33	**759**
Availability of parking	49	91	297	208	94	**739**
Community feel/neighborliness	112	173	232	197	56	**770**

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In Figure 9, responses were weighted on a scale of -2 to +2 where -2 indicated the respondent is very unsatisfied and +2 indicated the respondent is very satisfied. Overall, respondents were unsatisfied with 10 aspects of the corridor and satisfied with four. Of the greatest concern for residents was the amount of trash and litter, sense of safety, and the level of crime on the corridor. Aspects residents were satisfied with include the availability of parking, the frequency of bus service and location of bus stops, and the ease of walking to bus stops.

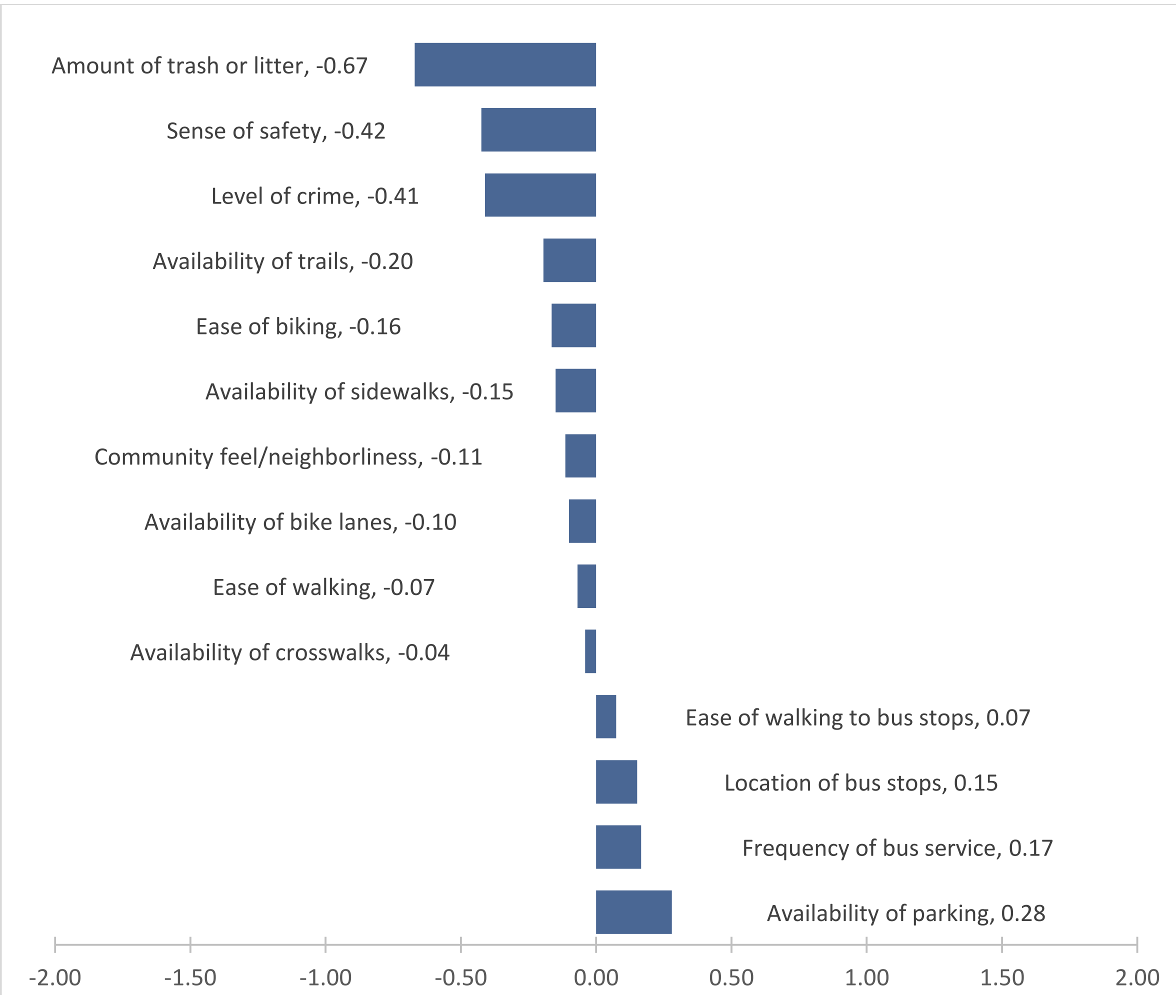

Figure 9. Level of satisfaction with 10 aspects of Where Martin Way (-2 to +2)

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Using the same -2 to +2 scale, resident responses were weighted and reviewed by corridor segment (Table 9). The data shows the amount of trash or litter, sense of safety, and level of crime were consistently three of the greatest concerns for corridor residents. Corridor residents in the five segments differed on the two other issues that rounded out the top five concerns:

- For Segment 1 residents, the ease of walking and availability of sidewalks
- For Segment 2 and 3 residents, community feel/neighborliness and the availability of trails
- For Segment 4 residents, the availability of trails and ease of biking
- For Segment 5 residents, the availability of trails and sidewalks.

Table 9. 5 Aspects of greatest concern to Martin Way corridor residents by corridor segment

Top 5 Concerns	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
1	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter
2	Sense of safety	Level of crime	Sense of safety	Level of crime	Availability of trails
3	Level of crime	Sense of safety	Availability of trails	Sense of safety	Sense of safety
4	Ease of walking	Community feel/ neighborliness	Level of crime	Availability of trails	Level of crime
5	Availability of sidewalks	Availability of trails	Community feel/neighborliness	Ease of biking	Availability of sidewalks

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Figure 10 compares responses received from those with a household income less than $35,00 per year to those with a household income of $35,000 or more. Figure 11 (next page) compares responses from people of color compared to those who are white and not Hispanic. Low-income respondents are unsatisfied with three aspects of Martin Way compared to 10 aspects for higher-income respondents. People of color were unsatisfied with five aspects compared with 10 for white, non-Hispanic respondents. Regardless of household income or race and ethnicity, the amount of trash or litter, sense of safety, and the level of crime continue to be aspects of greatest concern for Martin Way.

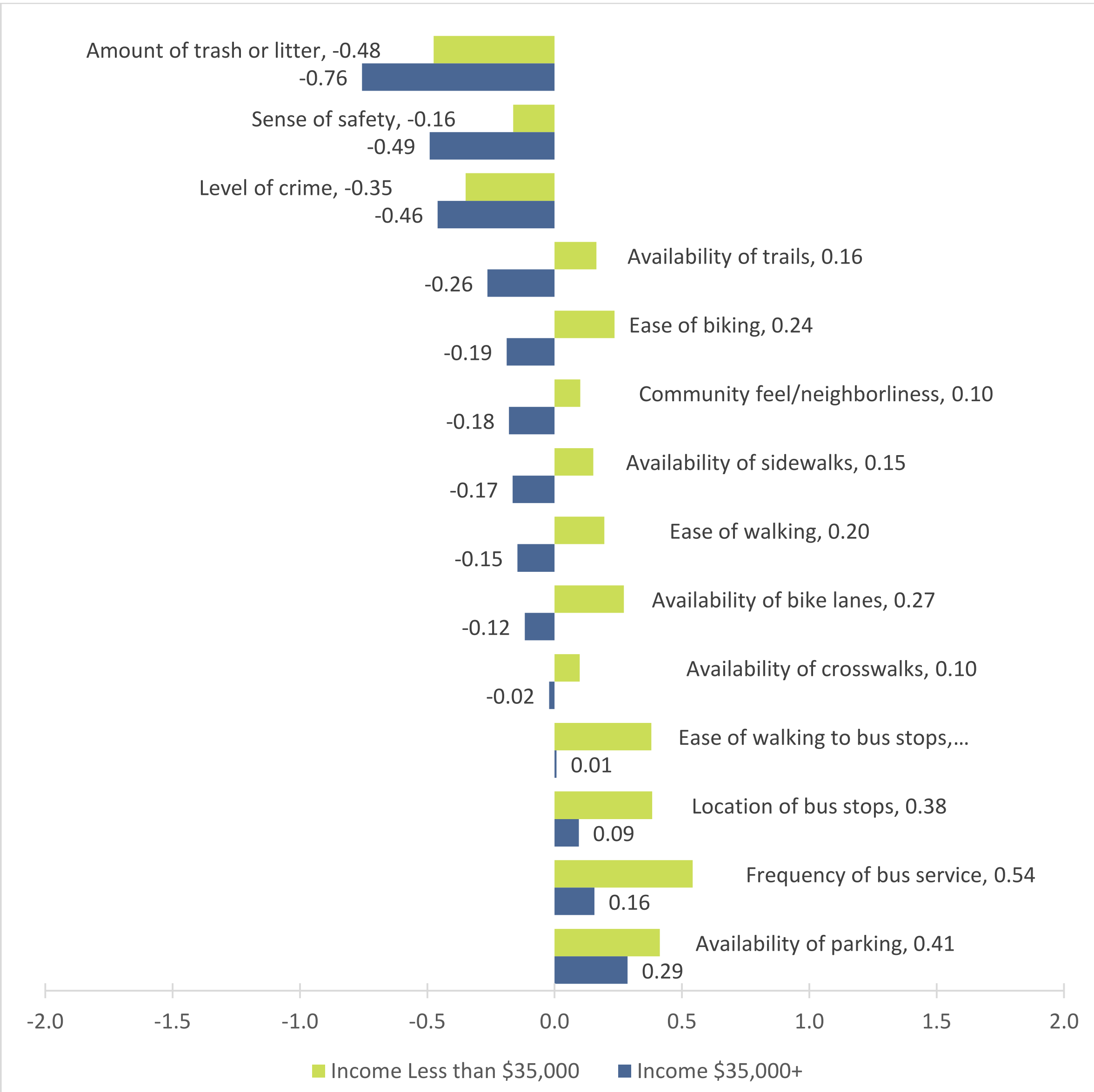

Figure 10. Comparing level of satisfaction between low- and higher-income respondents.

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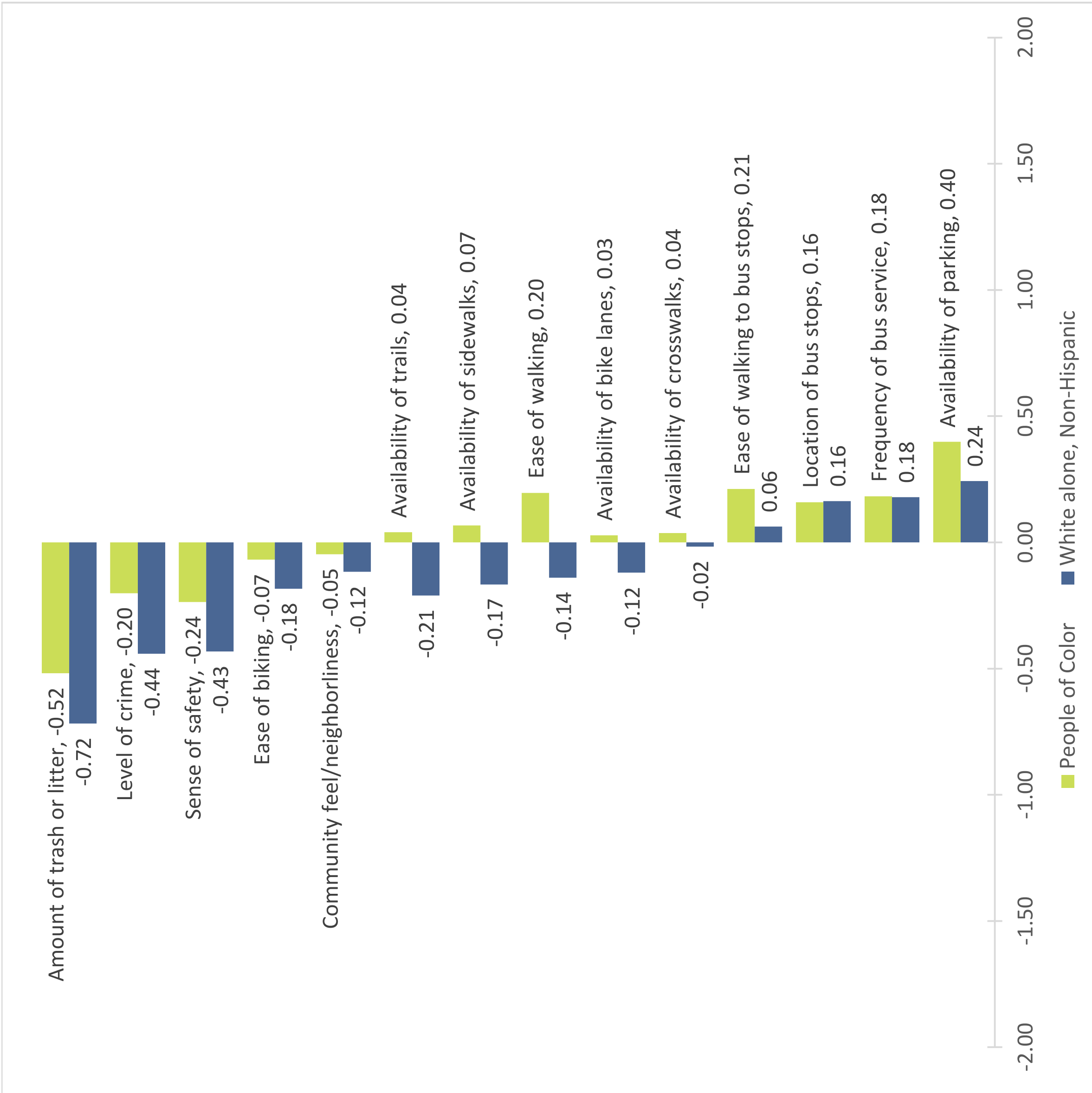

Figure 11. Comparing level of satisfaction between people of color and people who are white and not Hispanic

5. Transportation & Martin Way

Question 5 asked respondents about the frequency with which they traveled on Martin Way, focusing on what was typical before the COVID-19 pandemic (Table 10).

Table 10. How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

Q5. How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?							
To get to:	**Survey**	**Daily**	**1-2 times a week**	**1-2 times a month**	**Infre-quently**	**Never**	**Total**
Work	Residents	324	48	14	20	201	607
	Non-Residents	378	66	21	33	111	609
School	Residents	51	19	3	14	425	512
	Non-Residents	15	5	2	22	419	463
Big chain stores (Costco, Target, etc.)	Residents	106	412	117	34	6	675
	Non-Residents	49	245	201	99	29	623
Small businesses	Residents	93	337	138	67	13	648
	Non-Residents	42	200	206	107	39	594
I-5	Residents	238	241	88	60	28	655
	Non-Residents	176	185	114	96	32	603
Restaurants	Residents	53	263	201	116	18	651
	Non-Residents	30	162	206	170	28	596
Doctor appointments/ healthcare services	Residents	40	110	242	237	23	652
	Non-Residents	25	64	206	232	74	601
Other services (childcare, banks, etc.)	Residents	53	124	252	175	43	647
	Non-Residents	32	70	143	183	138	566
Total Respondents	**Residents**						**707**
	Non-Residents						**677**

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In Figure 12, responses for each destination are weighted on a scale of 0 to 7 where 0 indicated the respondents never travelled Martin Way and 7 indicates they travelled Martin Way every day. Overall, nonresidents are more likely to travel Martin Way to get to work while residents are more likely to travel Martin Way for every other reason.

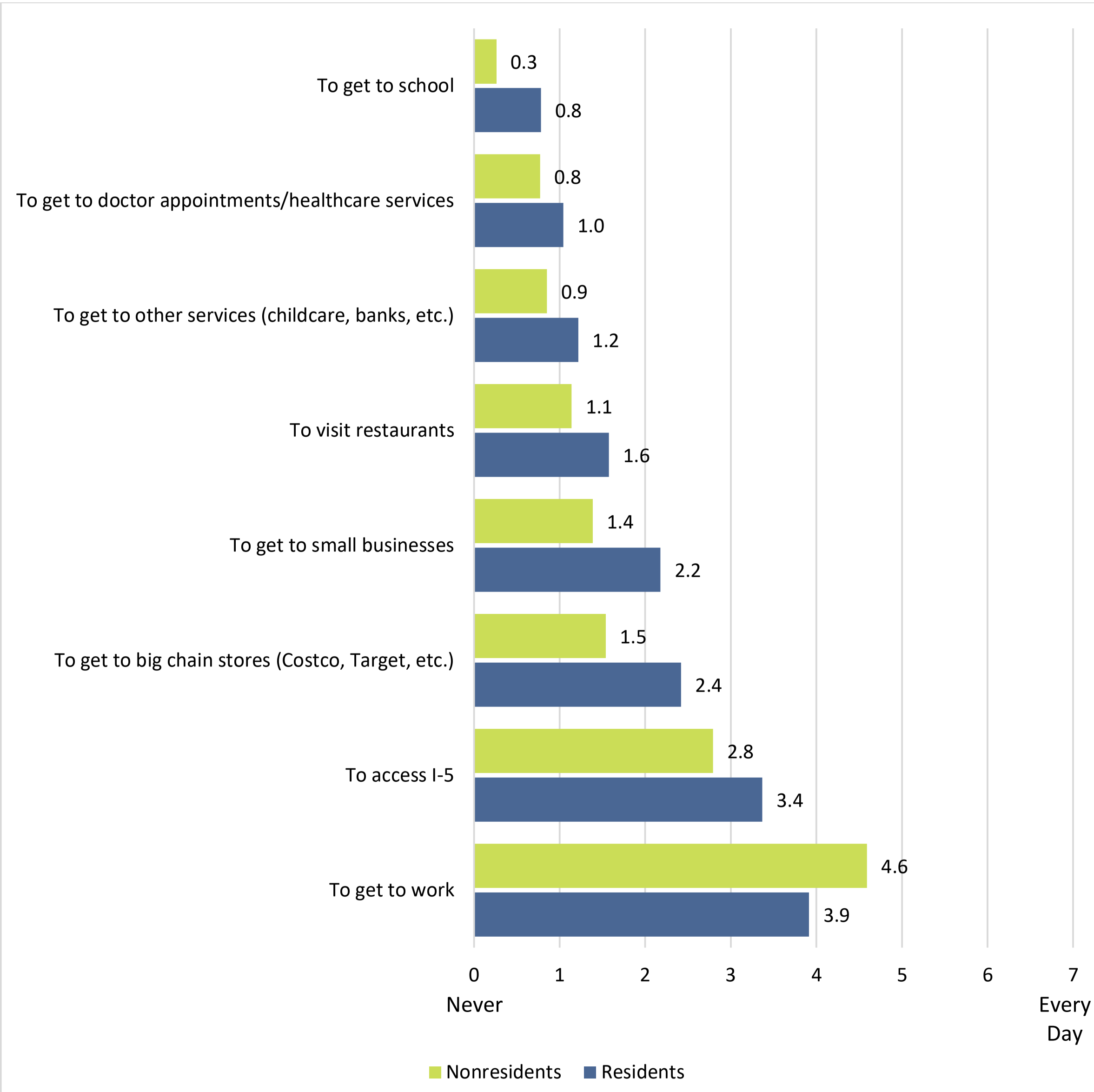

Figure 12. Purposes for travelling the Martin Way corridor

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Question 8 asked about the methods of transportation people use – and how frequently they use it (Table 11).

Table 11. Methods of travelling the Martin Way corridor

Q8. On average, how often do you use different methods of transportation along Martin Way?							
Method	Survey	Daily	1-2 times a week	1-2 times a month	Infre-quently	Never	Total
Drive a private vehicle	Residents	473	210	33	25	54	795
	Non-Residents	320	166	68	42	30	626
Ride in a private vehicle (passenger)	Residents	79	188	104	169	136	676
	Non-Residents	36	125	113	152	97	523
Ride the bus	Residents	29	34	24	100	485	672
	Non-Residents	26	20	43	102	336	527
Bicycle	Residents	12	39	51	102	472	676
	Non-Residents	13	24	33	125	326	521
Walk	Residents	57	63	77	180	318	695
	Non-Residents	16	29	32	76	374	527
Use a mobility device (such as a wheelchair or walker)	Residents	18	5	9	25	590	647
	Non-Residents	3	1	0	6	489	499
Other (please specify)	Residents	5	1	3	14	211	234
	Non-Residents						42
Total Respondents	**Residents**						**796**
	Non-Residents						**635**

In Figure 13, responses for each mode of transportation were averaged and weighted on a scale of 0 to 7 where 0 indicated the respondents never use a specific mode of transportation and 7 indicates they use the mode of transportation every day. Overall, residents were slightly less likely to ride the bus or bicycle than nonresidents. Driving a private vehicle is by far the most common method of transportation along the Martin Way corridor, followed by being a passenger in a private car. For residents, walking is the third most common method of travel while nonresidents are more likely to ride the bus.

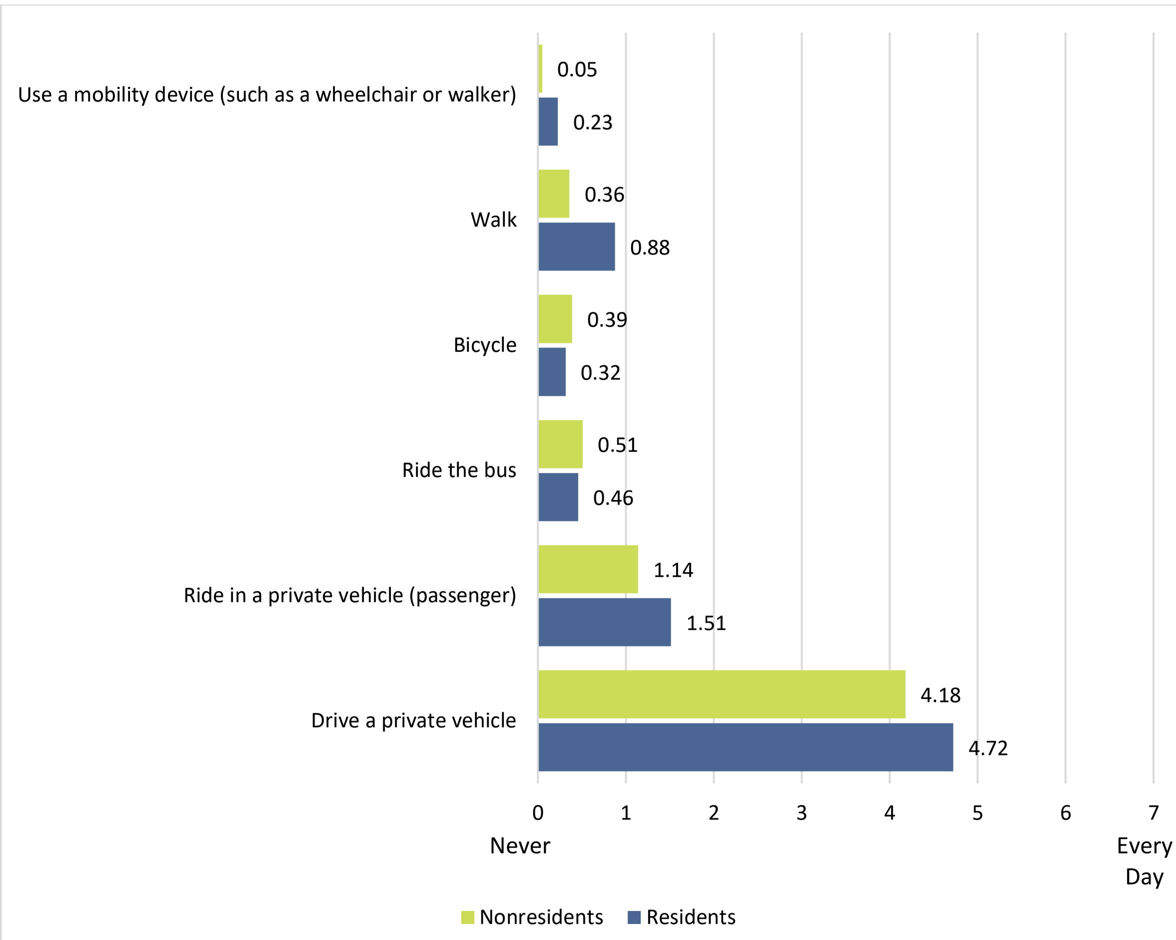

Figure 13. Frequency of travelling the Martin Way corridor by types of transportation

As discussed in Section 4 of this summary, Question 10 asked residents about their level of satisfaction with 14 aspects of the Martin Way corridor. Responses were reviewed to better understand differences based on how people travel.

- Frequent transit users (people who ride the bus daily or 1-2 times a week)
- Frequent walkers and mobility device users (people who walk or use a mobility device daily or 1-2 times a week)
- Frequent bicyclists (people who ride a bike daily or 1-2 times a week)

In general, respondents were most satisfied with the availability of parking and frequency of bus service regardless of how they get around. The data shows the amount of trash or litter, sense of safety, and the level of crime on the corridor were consistently three of the greatest concerns regardless of how a respondent travels the corridor (Table 12). Responses differed on the two other issues that rounded out the top five concerns:

- For all respondents, the availability of trails and ease of biking
- For frequent transit users, the availability of crosswalks and ease of biking
- For frequent walkers and mobility device users, the availability of trails and ease of biking
- For frequent bicyclists, the availability of trails and ease of walking

Table 12. 5 Aspects of greatest concern by travel mode

Top 5 Concerns	All Responses	Frequent Transit Users	Frequent Walkers and Mobility Device Users	Frequent Bicyclists
1	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter	Amount of trash or litter
2	Sense of safety	Level of crime	Sense of safety	Availability of trails
3	Level of crime	Availability of crosswalks	Level of crime	Ease of walking
4	Availability of trails	Sense of safety	Availability of trails	Sense of safety
5	Ease of biking	Ease of biking	Ease of biking	Level of crime

6. Future of Martin Way

Question 11 asked respondents about what they feel is important as the community plans for the future of Martin Way. Responses were weighted on a scale of -2 to 2 where -2 indicates a topic is not important to the respondent and +2 indicates a topic is very important. Both residents and nonresidents indicate the following are some of the most importation issues to consider (Table 13):

- Improve safety for all users
- Move traffic quickly through the corridor with minimum delay
- Increase places to safely cross Martin Way
- Improve accessibility for people with disabilities

While residents feel improving street lighting along the corridor is also one of the top five issues to address, nonresidents are more interested in the development of a trail system.

Table 13. Top 5 outcomes for the planning process

Top 5 Priorities	Residents	Non-Residents
1	Improve safety for all users	Improve safety for all users
2	Move traffic quickly through the corridor with minimum delay	Increase places to safely cross Martin Way (for example: add crosswalks)
3	Improve accessibility for people with disabilities	Move traffic quickly through the corridor with minimum delay
4	Increase places to safely cross Martin Way (for example: add crosswalks)	Improve accessibility for people with disabilities
5	Improve street lighting	Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations

**Ranking is on a scale of -2 to 2 where -2 indicated a topic was not important to the respondent and +2 indicated a topic was very important.*

Question 11 was also reviewed based on the respondents' household income and race and ethnicity when such information was provided (Tables 14 and 15, next page). The most important issues for respondents regardless of household income includes:

- Improving safety for all users
- Improving accessibility for people with disabilities
- Increasing places to safely cross Martin Way

Respondents with a household income less than $35,000 were also more interested in improving street lighting and housing affordability. Respondents with a household income of $35,000 or more were more interested in moving traffic quickly through the corridor with minimum delay and developing a trail system.

Table 14. Top 5 outcomes for the planning process for respondents by income

Top 5 Priorities	Respondents with a household income of less than $35,000	Respondents with a household income of $35,000 or more
1	Improve safety for all users	Improve safety for all users
2	Improve accessibility for people with disabilities	Move traffic quickly through the corridor with minimum delay
3	Improve housing affordability	Increase places to safely cross Martin Way (for example: add crosswalks)
4	Improve street lighting	Improve accessibility for people with disabilities
5	Increase places to safely cross Martin Way (for example: add crosswalks)	Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations

**Ranking is on a scale of -2 to 2 where -2 indicated a topic was not important to the respondent and +2 indicated a topic was very important.*

The most important issues for respondents regardless of race and ethnicity include:

- Improving safety for all users
- Moving traffic quickly through the corridor with minimum delay
- Increasing places to safely cross Martin Way
- Improving accessibility for people with disabilities

People of color were also interested in improving street lighting while people who are white alone were interested in developing a trail system.

Table 15. Top 5 outcomes for the planning process for respondents by race and ethnicity

Top 5 Priorities	People of Color§	People who are White, Non-Hispanic
1	Improve safety for all users	Improve safety for all users
2	Move traffic quickly through the corridor with minimum delay	Move traffic quickly through the corridor with minimum delay
3	Increase places to safely cross Martin Way (for example: add crosswalks)	Increase places to safely cross Martin Way (for example: add crosswalks)
4	Improve accessibility for people with disabilities	Improve accessibility for people with disabilities
5	Improve street lighting	Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations

§Includes those who are any race other than white alone and those who are Hispanic of any race.
**Ranking is on a scale of -2 to 2 where -2 indicated a topic was not important to the respondent and +2 indicated a topic was very important.*

Martin Way Corridor Study
Residential Survey Summary

Appendix A. Surveys

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Martin Way Corridor Study
Residential Survey Summary

Online Survey

MARTIN WAY CORRIDOR
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Martin Way Corridor Survey

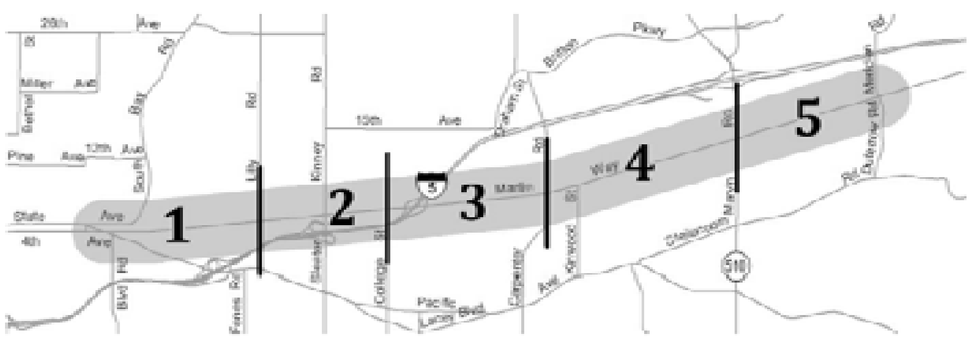
Dear Neighbor,

We need your help to find ways to improve travel along Martin Way for everyone, including for people who drive, walk, bicycle, ride a bus, carpool or vanpool, or use a wheelchair or other mobility device.

Thurston County, the cities of Lacey and Olympia, and Intercity Transit would like your thoughts on the future of transportation and development along Martin Way. We're calling this the "Martin Way Corridor Study," and our study area is between Pacific Avenue and Marvin Road (see map - the numbers mark different sections of the corridor).

Please complete this survey by Wednesday, September 30, 2020.

Materials can be provided in alternate formats by contacting the Thurston Regional Planning Council at 360.956.7575 or email info@trpc.org.



1

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1. Choose the answer that best matches your situation:

- ◯ I live on or near the Martin Way Corridor
- ◯ I own residential property on or near the Martin Way Corridor, but don't live there.
- ◯ I work on or near the Martin Way Corridor
- ◯ I don't live or work along the Martin Way Corridor, but I often travel on Martin Way

Martin Way Corridor Study
Residential Survey Summary

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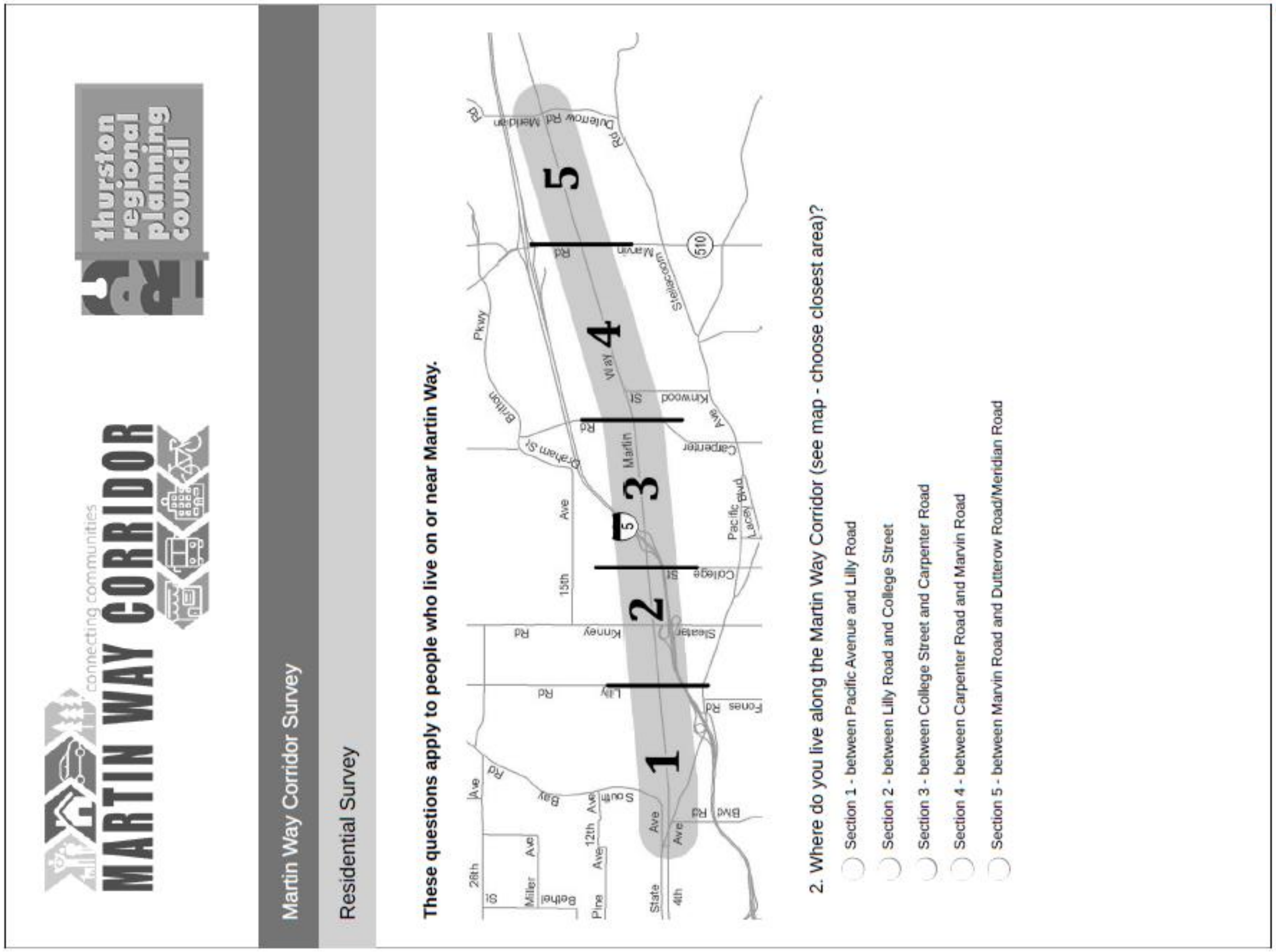

MARTIN WAY CORRIDOR
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Martin Way Corridor Survey

Residential Survey

These questions apply to people who live on or near Martin Way.

2. Where do you live along the Martin Way Corridor (see map - choose closest area)?

- Section 1 - between Pacific Avenue and Lilly Road
- Section 2 - between Lilly Road and College Street
- Section 3 - between College Street and Carpenter Road
- Section 4 - between Carpenter Road and Marvin Road
- Section 5 - between Marvin Road and Dutterow Road/Meridian Road

3

3. How long have you lived in your current location?

- Less than 1 year
- 1-2 years
- 2-3 years
- 3-4 years
- 4-5 years
- 5-10 years
- 10 or more years

4. My household:

- Rents our home
- Owns our home
- Lives with someone else
- Is unhoused or unsheltered

5. Where do you work?

- [ ] At my home
- [ ] At a business or office located on the Martin Way Corridor
- [ ] At a business or office located elsewhere in Thurston County
- [ ] At Joint Base Lewis-McChord, active-duty military
- [ ] At Joint Base Lewis-McChord, civilian or contract position
- [ ] At a business or office located elsewhere in Pierce County
- [ ] At a business or office located somewhere else
- [ ] Retired
- [ ] Not employed

6. How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
To get to work	○	○	○	○	○
To get to school	○	○	○	○	○
To get to big chain stores (such as Costco, Target, Home Depot, Best Buy)	○	○	○	○	○
To get to small businesses	○	○	○	○	○
To access I-5	○	○	○	○	○
To visit restaurants	○	○	○	○	○
To get to doctor appointments or other healthcare services	○	○	○	○	○
To get to other services, like child care, financial services, personal care (hair and nail salons)	○	○	○	○	○

Other (please specify)

7. What do you like most about living on or near Martin Way?

8. If you could do one thing to improve Martin Way, what would you do?

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9. On average, how often do you use different methods of transportation along Martin Way?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
Drive a private vehicle	◯	◯	◯	◯	◯
Ride in a private vehicle (passenger)	◯	◯	◯	◯	◯
Ride the bus	◯	◯	◯	◯	◯
Bicycle	◯	◯	◯	◯	◯
Walk	◯	◯	◯	◯	◯
Use a mobility device (such as a wheelchair or walker)	◯	◯	◯	◯	◯

Other (please specify)

10. As a resident living near the Martin Way Corridor, tell us about the businesses and services you need, and how easy it is to get there.

	Very hard to get to	Moderately hard to get to	Neutral	Moderately easy to get to	Very easy to get to
Grocery stores/markets	○	○	○	○	○
Convenience stores	○	○	○	○	○
Specialty/ethnic markets	○	○	○	○	○
Pharmacies	○	○	○	○	○
Parks, trails, and public places to enjoy nature and open space	○	○	○	○	○
Schools	○	○	○	○	○
Hospital and doctors' offices	○	○	○	○	○
Restaurants	○	○	○	○	○
Coffee shops	○	○	○	○	○
Fitness clubs or places to work out	○	○	○	○	○
Social services (such as unemployment office)	○	○	○	○	○
Local businesses	○	○	○	○	○
Chain retailers (such as Target or Home Depot)	○	○	○	○	○
Different kinds of housing	○	○	○	○	○
Affordable housing	○	○	○	○	○
Entertainment (movies, etc.)	○	○	○	○	○

11. As a resident living near the Martin Way Corridor, tell us how satisfied you are with aspects of the area.

	Very unsatisfied	Moderately unsatisfied	Neutral	Moderately satisfied	Very satisfied
Ease of walking	○	○	○	○	○
Availability of sidewalks	○	○	○	○	○
Availability of crosswalks	○	○	○	○	○
Ease of biking	○	○	○	○	○
Availability of bike lanes	○	○	○	○	○
Availability of trails	○	○	○	○	○
Frequency of bus service	○	○	○	○	○
Location of bus stops	○	○	○	○	○
Ease of walking to bus stops	○	○	○	○	○
Amount of trash or litter	○	○	○	○	○
Sense of safety	○	○	○	○	○
Level of crime	○	○	○	○	○
Availability of parking	○	○	○	○	○
Community feel/neighborliness	○	○	○	○	○

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Martin Way Corridor Study
Residential Survey Summary

12. As we plan together for the Martin Way Corridor, what do you think is important?

	Not important	Less important	Neutral	Important	Very important	No opinion
Ensure there is a mix of different kinds of housing for young adults, families, and older adults						
Increase the amount of rental housing						
Improve housing affordability						
Increase places to safely cross Martin Way (for example: add crosswalks)						
Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations						
Improve accessibility for people with disabilities						
Bring new businesses and jobs						
Faster bus service that comes more often						
Improve street lighting						
Move traffic quickly through the corridor with minimum delay						
Improve safety for all users						
Add more landscaping and shade trees						
Increase mix of businesses and services within walking distance						

13. Is there anything we missed that you'd like us to know as we look at options for the Martin Way Corridor?

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Martin Way Corridor Study
Residential Survey Summary

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MARTIN WAY CORRIDOR

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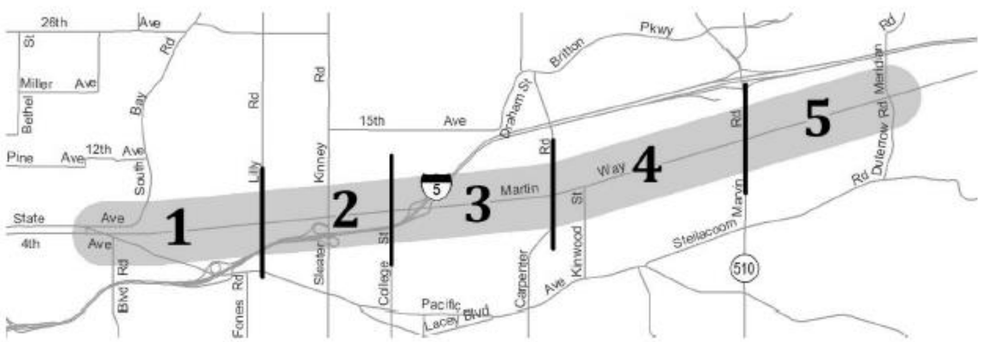
Martin Way Corridor Survey

Property Owner Survey

These questions apply to people who own property on or near the Martin Way Corridor, but do not live there.



14. Where do you own property along the Martin Way Corridor (see map - choose closest area)?

- Section 1 - between Pacific Avenue and Lilly Road
- Section 2 - between Lilly Road and College Street
- Section 3 - between College Street and Carpenter Road
- Section 4 - between Carpenter Road and Marvin Road
- Section 5 - between Marvin Road and Dutterow Road/Meridian Road
- I live outside the Martin Way Corridor, and don't own property there

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15. How long have you owned property along Martin Way?

- Less than 1 year
- 1-2 years
- 2-3 years
- 3-4 years
- 4-5 years
- 5-10 years
- 10 or more years

Martin Way Corridor Study
Residential Survey Summary

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MARTIN WAY CORRIDOR

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Martin Way Corridor Survey

General Survey

16. How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
To get to work	◯	◯	◯	◯	◯
To get to school	◯	◯	◯	◯	◯
To get to big chain stores (such as Costco, Target, Home Depot, Best Buy)	◯	◯	◯	◯	◯
To get to small businesses	◯	◯	◯	◯	◯
To access I-5	◯	◯	◯	◯	◯
To visit restaurants	◯	◯	◯	◯	◯
To get to doctor appointments or other healthcare services	◯	◯	◯	◯	◯
To get to other services, like child care, financial services, personal care (hair and nail salons)	◯	◯	◯	◯	◯

Other (please specify)

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17. What do you like most about Martin Way?

18. If you could do one thing to improve Martin Way, what would you do?

19. On average, how often do you use different methods of transportation along Martin Way?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
Drive a private vehicle	○	○	○	○	○
Ride in a private vehicle (passenger)	○	○	○	○	○
Ride the bus	○	○	○	○	○
Bicycle	○	○	○	○	○
Walk	○	○	○	○	○
Use a mobility device (such as a wheelchair or walker)	○	○	○	○	○

Other (please specify)

Martin Way Corridor Study
Residential Survey Summary

20. As we plan together for the Martin Way Corridor, what do you think is important?

	Not important	Less important	Neutral	Important	Very important	No opinion
Ensure there is a mix of different kinds of housing for young adults, families, and older adults	○	○	○	○	○	○
Increase the amount of rental housing	○	○	○	○	○	○
Improve housing affordability	○	○	○	○	○	○
Increase places to safely cross Martin Way (for example: add crosswalks)	○	○	○	○	○	○
Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations	○	○	○	○	○	○
Improve accessibility for people with disabilities	○	○	○	○	○	○
Bring new businesses and jobs	○	○	○	○	○	○
Faster bus service that comes more often	○	○	○	○	○	○
Improve street lighting	○	○	○	○	○	○
Move traffic quickly through the corridor with minimum delay	○	○	○	○	○	○
Improve safety for all users	○	○	○	○	○	○
Add more landscaping and shade trees	○	○	○	○	○	○
Increase mix of businesses and services within walking distance	○	○	○	○	○	○

21. Is there anything we missed that you'd like us to know as we look at options for the Martin Way Corridor?

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Martin Way Corridor Study
Residential Survey Summary

Martin Way Corridor Study
Residential Survey Summary

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Martin Way Corridor Survey

Contact Info

22. Would you like to participate in other community planning activities for the Martin Way Corridor?

- Yes
- No

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Martin Way Corridor Survey

Contact Information

23. Please provide your email address so we can reach out to you. If you want to participate, but don't have email, please provide a phone number.

Full name:

Email address:

Phone number:

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Martin Way Corridor Survey

Demographic Questions

Please help us understand more about who lives and works in the Martin Way Corridor by completing the following demographic section of this survey.

Thurston Regional Planning Council ensures full compliance with Title VI of the Civil Rights Act of 1964 by prohibiting discrimination against any person based on race, color, national origin, or sex in the provision of benefits and services resulting from its federally assisted programs and activities.

Information about your race, ethnicity, age, income, and/or gender that is provided voluntarily through this survey may be used to monitor TRPC's Title VI program.

24. What is your gender?

- Female
- Male
- Other (please specify)

25. What is your age?

- 0-14
- 15-24
- 25-39
- 40-54
- 55-69
- 70-84
- 85 or older

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26. What is your race/ethnicity (check as many as apply)?

- [ ] American Indian & Alaska Native
- [ ] Asian
- [ ] Black/African American
- [ ] Hispanic or Latino
- [ ] Native Hawaiian & Pacific Islander
- [ ] White
- [ ] Other (please specify)

27. What is your household's annual income (before taxes)?

- Less than $14,999
- $15,000-$24,999
- 25,000-$34,999
- $35,000-$49,000
- $50,000-$74,999
- $75,000-99,999
- $100,000 or more
- I don't know

Martin Way Corridor Study
Residential Survey Summary

MARTIN WAY CORRIDOR
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Martin Way Corridor Survey

Thank you!

Thank you for taking this survey! You have helped us understand what is important to people who live on the Martin Way Corridor.

You will have other chances to be a part of this project over the next year. If you have any questions or other comments, please visit www.trpc.org/martinway or contact Allison Osterberg at OsterbergA@trpc.org.

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Martin Way Corridor Study
Residential Survey Summary

Print Survey

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MARTIN WAY CORRIDOR

Dear Neighbor,

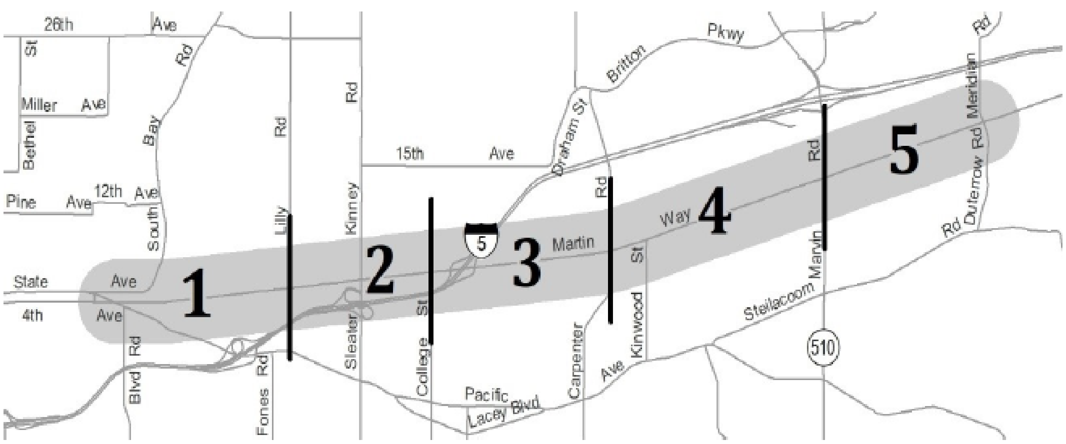
We need your help to find ways to improve travel along Martin Way for everyone, including people who drive, walk, bicycle, ride a bus, carpool or vanpool, or use a wheelchair or other mobility device.

Thurston County, the cities of Lacey and Olympia, and Intercity Transit would like your thoughts on the future of transportation and development along Martin Way. We're calling this the "Martin Way Corridor Study," and our study area is between Pacific Avenue and Marvin Road (see map).

Instructions:

o Anyone in your household may complete this survey.
o If more than one person wants to complete the survey, call TRPC at (360) 956-7575 to ask for more surveys.
o Please answer the following questions for the study area shown on the map below.

Figure 1. Map of the Martin Way Corridor



Please return the completed survey(s) in the enclosed postage-paid envelope by **Wednesday, September 30**. You may also take this survey online by visiting the following website: www.trpc.org/martinway.

¡Queremos sus comentarios! Háganos saber si desea esta encuesta traducida en otro idioma que no sea inglés. Contact us at 360-956-7575 or info@trpc.org.

Chúng tôi muốn biết ý kiến của quý vị! Nếu quý vị muốn khảo sát này được dịch sang ngôn ngữ khác ngoài tiếng Anh, vui lòng cho chúng tôi biết. Contact us at 360-956-7575 or info@trpc.org.

여러분의 의견이 궁금합니다! 영어 이외의 언어로 번역된 설문지를 원하시면 저희에게 알려주세요.
Contact us at 360-956-7575 or info@trpc.org.

To respond: or

thurston regional planning council

4240 0001

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Martin Way Corridor Study
Residential Survey Summary

1) Where do you live along the Martin Way Corridor (see map on previous page – choose closest area)?

- ◯ Section 1 – between Pacific Avenue and Lilly Road
- ◯ Section 2 – between Lilly Road and College Street
- ◯ Section 3 – between College Street and Carpenter Road
- ◯ Section 4 – between Carpenter Road and Marvin Road
- ◯ Section 5 – between Marvin Road and Dutterow Road/Meridian Road
- ◯ I don't live along Martin Way Corridor, but own property there (also mark the section where your property is located)
- ◯ I live outside the Martin Way Corridor, and don't own property there

2) How long have you lived in your current location?

- ◯ Less than 1 year
- ◯ 1-2 years
- ◯ 2-3 years
- ◯ 3-4 years
- ◯ 4-5 years
- ◯ 5-10 years
- ◯ 10 or more years

3) My household:

- ◯ Rents our home
- ◯ Owns our home
- ◯ Lives with someone else
- ◯ Is unhoused or unsheltered

4) Where do you work?

- ◯ At my home
- ◯ At a business or office located on the Martin Way Corridor
- ◯ At a business or office located elsewhere in Thurston County
- ◯ At Joint Base Lewis-McChord, active-duty military
- ◯ At Joint Base Lewis-McChord, civilian or contract position
- ◯ At a business or office located elsewhere in Pierce County
- ◯ At a business or office located somewhere else
- ◯ Retired
- ◯ Not employed

To respond: ⊠ or ●

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Martin Way Corridor Study
Residential Survey Summary

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MARTIN WAY CORRIDOR

5) How often do you travel along Martin Way to do the following (what was typical before the current pandemic)?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
To get to work	☐	☐	☐	☐	☐
To get to school	☐	☐	☐	☐	☐
To get to big chain stores (such as Costco,Target, Home Depot, Best Buy)	☐	☐	☐	☐	☐
To get to small businesses	☐	☐	☐	☐	☐
To access I-5	☐	☐	☐	☐	☐
To visit restaurants	☐	☐	☐	☐	☐
To get to doctors' appointments or other healthcare services	☐	☐	☐	☐	☐
To get to other services, like child care, financial services, personal care (hair and nail salons)	☐	☐	☐	☐	☐

6) What do you like most about living on or near Martin Way?

7) If you could do one thing to improve Martin Way, what would you do?

To respond: ☒ or ●

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Martin Way Corridor Study
Residential Survey Summary

8) On average, how often do you use different methods of transportation along Martin Way?

	Daily	1-2 times a week	1-2 times a month	Infrequently	Never
Drive a private vehicle	☐	☐	☐	☐	☐
Ride in a private vehicle (passenger)	☐	☐	☐	☐	☐
Ride the bus	☐	☐	☐	☐	☐
Bicycle	☐	☐	☐	☐	☐
Walk	☐	☐	☐	☐	☐
Use a mobility device (such as a wheelchair or walker)	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

Other (please tell us about it)

9) As a resident living near the Martin Way Corridor, tell us about the businesses and services you need, and how easy it is to get there.

	Very hard to get to	Moderately hard to get to	Neutral	Moderately easy to get to	Very easy to get to
Grocery stores/markets	☐	☐	☐	☐	☐
Convenience stores	☐	☐	☐	☐	☐
Specialty/ethnic markets	☐	☐	☐	☐	☐
Pharmacies	☐	☐	☐	☐	☐
Parks, trails, and public places to enjoy nature and open space	☐	☐	☐	☐	☐
Schools	☐	☐	☐	☐	☐
Hospital and doctors' offices	☐	☐	☐	☐	☐
Restaurants	☐	☐	☐	☐	☐
Coffee shops	☐	☐	☐	☐	☐
Fitness clubs or places to work out	☐	☐	☐	☐	☐
Social services (such as an unemployment office)	☐	☐	☐	☐	☐
Local businesses	☐	☐	☐	☐	☐
Chain retailers (such as Target or Home Depot)	☐	☐	☐	☐	☐
Different kinds of housing	☐	☐	☐	☐	☐
Affordable housing	☐	☐	☐	☐	☐
Entertainment (movies, etc)	☐	☐	☐	☐	☐

To respond: ☒ or ●

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4240 0004

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MARTIN WAY CORRIDOR
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10) As a resident living near the Martin Way Corridor, tell us how satisfied you are with aspects of the area.

	Very unsatisfied	Moderately unsatisfied	Neutral	Moderately satisfied	Very satisfied
Ease of walking	☐	☐	☐	☐	☐
Availability of sidewalks	☐	☐	☐	☐	☐
Availability of crosswalks	☐	☐	☐	☐	☐
Ease of biking	☐	☐	☐	☐	☐
Availability of bike lanes	☐	☐	☐	☐	☐
Availability of trails	☐	☐	☐	☐	☐
Frequency of bus service	☐	☐	☐	☐	☐
Location of bus stops	☐	☐	☐	☐	☐
Ease of walking to bus stops	☐	☐	☐	☐	☐
Amount of trash or litter	☐	☐	☐	☐	☐
Sense of safety	☐	☐	☐	☐	☐
Level of crime	☐	☐	☐	☐	☐
Availability of parking	☐	☐	☐	☐	☐
Community feel/ neighborliness	☐	☐	☐	☐	☐

To respond: ☒ or ●

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Martin Way Corridor Study
Residential Survey Summary

11) As we plan together for the Martin Way Corridor, what do you think is important?

	Not important	Less important	Neutral	Important	Very important	No opinion
Ensure there is a mix of different kinds of housing for young adults, families, and older adults	☐	☐	☐	☐	☐	☐
Increase the amount of rental housing	☐	☐	☐	☐	☐	☐
Improve housing affordability	☐	☐	☐	☐	☐	☐
Increase places to safely cross Martin Way (for example: crosswalks)	☐	☐	☐	☐	☐	☐
Develop a trail system that makes it easier to walk or bike between homes and parks, shopping areas, and other destinations	☐	☐	☐	☐	☐	☐
Improve accessibility for people with disabilities	☐	☐	☐	☐	☐	☐
Bring new businesses and jobs	☐	☐	☐	☐	☐	☐
Faster bus service that comes more often	☐	☐	☐	☐	☐	☐
Improve street lighting	☐	☐	☐	☐	☐	☐
Move traffic quickly through the corridor with minimum delay	☐	☐	☐	☐	☐	☐
Improve safety for all users	☐	☐	☐	☐	☐	☐
Add more landscaping and shade trees	☐	☐	☐	☐	☐	☐
Increase mix of businesses and services within walking distance	☐	☐	☐	☐	☐	☐

12) Is there anything we missed that you'd like us to know as we look at options for the Martin Way Corridor?

13) Would you like to participate in other community planning activities for the Martin Way Corridor?

◯ Yes (be sure to leave your email address or other contact information)

◯ No

To respond: ⊠ or ●

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Martin Way Corridor Study
Residential Survey Summary

MARTIN WAY CORRIDOR
connecting communities

14) If you answered "Yes," please provide your full name and email address so we can reach you. If you want to participate, but don't have email, please provide your name and phone number.

Please help us understand more about who lives and works in the Martin Way Corridor by completing the following demographic section of this survey.

Thurston Regional Planning Council ensures full compliance with Title VI of the Civil Rights Act of 1964 by prohibiting discrimination against any person based on race, color, national origin, or sex in the provision of benefits and services resulting from its federally assisted programs and activities.

Information about your race, ethnicity, age, income, and/or gender that is provided voluntarily through this survey may be used to monitor TRPC's Title VI program.

Materials can be provided in alternate formats by contacting the Thurston Regional Planning Council at 360.956.7575 or email info@trpc.org.

15) What is your gender?

- ○ Female
- ○ Male
- ○ Other

Other

16) What is your race/ethnicity (check as many as apply)?

- ☐ American Indian & Alaska Native
- ☐ Asian
- ☐ Black/African American
- ☐ Hispanic or Latino
- ☐ Native Hawaiian & Pacific Islander
- ☐ White
- ☐ Other

Other

To respond: ☒ *or* ●

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Martin Way Corridor Study
Residential Survey Summary

17) What is your household's annual income (before taxes)?

- ◯ Less than $14,999
- ◯ $15,000-$24,999
- ◯ $25,000-$34,999
- ◯ $35,000-$49,000
- ◯ $50,000-$74,999
- ◯ $75,000-$99,999
- ◯ $100,000 or more
- ◯ I don't know

Thank you for taking this survey! You have helped us understand what is important to people who live on the Martin Way Corridor.

You'll have other chances to be a part of this project over the next year. If you have any questions or other comments, please visit https://www.trpc.org/martinway or contact Allison Osterberg at OsterbergA@trpc.org.

To respond: ☒ or ●

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Appendix 2 Business Survey

Martin Way Corridor Survey Results

Submitted April 2021

THURSTON REGIONAL PLANNING COUNCIL

THURSTON EDC CENTER for BUSINESS & INNOVATION

Introduction and Acknowledgements

In June of 2020 the Thurston Regional Planning Council contracted with the Thurston Economic Development Council to conduct a survey of business perceptions of the Martin Way corridor. Survey elements included questions related to safety, methods of access, conditions of amenities and more. Survey responses will be used in long range planning efforts for Martin Way by Thurston County, The City of Olympia and The City of Lacey.

A 12 question survey was conducted within the Survey Monkey online platform and administered to businesses along 5 designated zones. The survey was administered primarily over the phone and was supported by email and in-person contact when necessary to capture responses.

This survey was conducted primarily in early 2021. As such, significant attention had to be given to the COVID-19 pandemic and survey methods were adjusted to accommodate the needs of businesses. Surveys were primarily conducted by phone to protect the safety of both the research staff and the respondents. Due to decreases in employee capacity, many businesses did not have the free time to participate in the survey and some opted to leave during the middle of the survey to attend to customer needs.

Special attention was given to accommodate businesses by scheduling surveys in multiple parts or allowing businesses to email their responses. In addition, respondents were offered the opportunity to be notified of COVID-19 support services available to businesses in Thurston County.

This survey could not have been successfully completed without the participation of the Thurston Regional Planning Council and their steering committee:

City of Olympia
- Joyce Philips
- Sophie Stimson

City of Lacey
- Rick Walk
- Ryan Andrews
- Martin Hoppe

Thurston County
- Jennifer Davis
- Leah Davis
- Matt Unzelman
- Becky Conn
- Theresa Parsons

Intercity Transit
- Eric Phillips
- Mike Burnham
- Rob LaFontaine

Thurston Regional Planning Council
- Allison Osterberg
- Katrina Van Every
- Aidan Dixon
- Karen Parkhurst

Their guidance and suggestions were critical to preparing a survey instrument that met the needs of the project. Allison Osterberg of Thurston Regional Planning Council acted as the contract manager for this project and was critical to the success of the project. The research team consisted of Emily Gooding (Intern, Saint Martin's University), Julia Wojnar (Thurston EDC), Ryan Norskog (Thurston EDC) and was supervised by Gene Angel (Thurston EDC). Questions and comments on this document can be made to Gene Angel, Director of Research and Evaluation at the Thurston Economic Development Council.[1]

Businesses Contacted

The Thurston Economic Development Council employed three survey methods to gather feedback for this project: in-person, email and telephone. The primary mechanism used to gather responses was by phone. In total, 80 businesses completed surveys meeting the project goal.

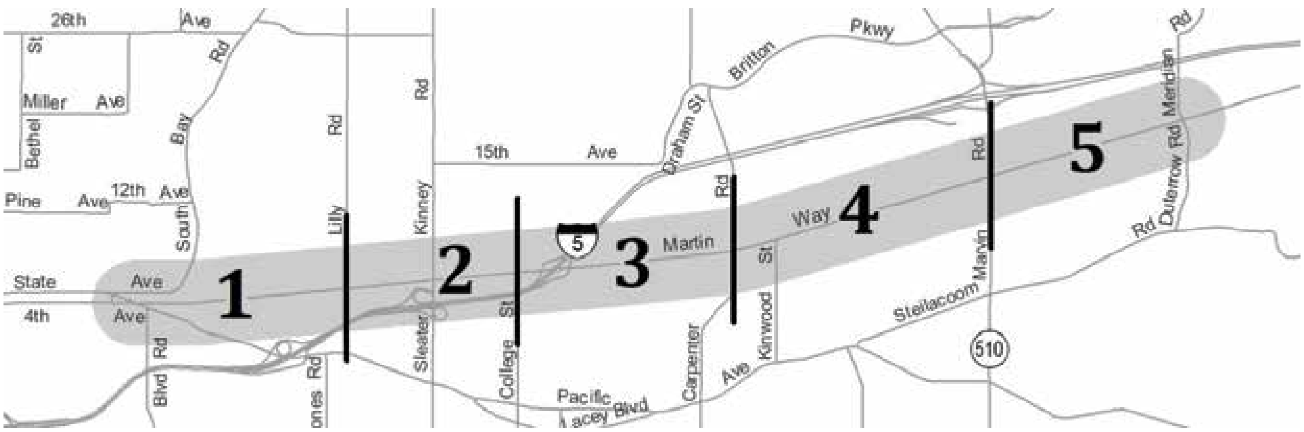
The Thurston Economic Development Council reached out to 450 businesses and received responses back from 80 representing an overall response rate of 17.78%. Businesses were surveyed between January 1st 2021 and March 3rd 2021.

Areas Represented

The survey area for this project is focused along the Martin Way corridor which winds its way through Olympia, WA and Lacey, WA in Thurston County. Businesses eligible to participate in this survey must be located on or near the Martin Way corridor in one of the five designated zones:

Zone 1 is defined as the area of Martin Way between Pacific Avenue and Lilly Road. Zone 2 is defined as the area between Lilly Road and College Street. Zone 3 is defined as the area between College Street and Carpenter Road. Zone 4 is defined as the area between Carpenter Road and Marvin Road. Zone 5 is defined as the area between Marvin Road and Meridian Road.

Image 1: Map of Survey Area by Zone



Business Characteristics

Business characteristics of industry, size and age were generally well represented throughout zones 1-5. The typical business represented in this survey was a small business with less than 10 full-time employees, operates in the retail trade industry and has been operating for less than 40 years.

Industry Representation

In total, 80 businesses were surveyed for this project with Retail Trade (NAICS 44-45) being the far and away most common respondent at 30. The next most represented industry sector was Accommodation and Food Services (NAICS 72) with 9 respondents.

When comparing distributions between responses and the business census[2] we find that Retail Trade represents approximately 38% of all respondents while only representing 17% of the general business activity along the corridor. This overrepresentation in Retail Trade might be explained by virtue of retail businesses being more capable of responding to survey requests rather when compared to the Health Care sector which was underrepresented at just 7.5% of total respondents compared against 15% of the total business population along the corridor.

[1] Email Gene Angel at gangel@thurstonedc.com

[2] The business census for this report was created using the ZoomProspector tool, a GIS based business analytics database that pulls business records geographically by NAICS. A full copy of this census has been given to the Thurston Regional Planning Council with this report.

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Table 1: Industry Distribution of Respondents, by Zone

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total	% Total
Agriculture, Forestry, Fishing and Hunting	0	0	0	0	0	0	0.0%
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0.0%
Utilities	0	0	0	0	0	0	0.0%
Construction	1	0	0	2	0	3	3.8%
Manufacturing	1	0	0	1	0	2	2.5%
Wholesale Trade	1	0	1	3	0	5	6.3%
Retail Trade	4	4	2	16	4	30	37.5%
Transportation and Warehousing	0	1	0	0	0	1	1.3%
Information	0	0	0	0	0	0	0.0%
Finance and Insurance	0	4	2	1	0	7	8.8%
Real Estate and Rental and Leasing	0	0	0	0	1	1	1.3%
Professional, Scientific, and Technical Services	1	0	1	3	1	6	7.5%
Management of Companies and Enterprises	0	0	0	0	0	0	0.0%
Administrative and Support and Waste Managemen..	0	0	0	0	0	0	2.5%
Educational Services	0	1	0	1	0	2	2.5%
Health Care and Social Assistance	1	4	0	0	1	6	7.5%
Arts, Entertainment, and Recreation	0	0	0	0	0	0	0.0%
Accommodation and Food Services	0	4	2	2	1	9	11.3%
Other Services (except Public Administration)	3	0	1	3	1	8	10.0%
Public Administration	0	0	0	0	0	0	0.0%
All Industries	12	18	9	32	9	80	100.0%

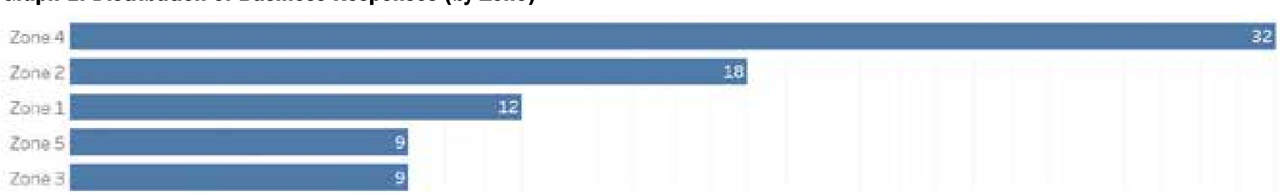
Table 2: Industry Distribution Business Census, by Zone

Description	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total	% Total
Agriculture, Forestry, Fis..	0	0	1	0	0	1	0.10%
Mining, Quarrying, and Oi..	0	1	0	0	0	1	0.10%
Utilities	1	0	0	0	0	1	0.10%
Construction	6	13	4	10	10	43	4.21%
Manufacturing	3	7	0	10	0	20	1.96%
Wholesale Trade	4	9	1	9	2	25	2.45%
Retail Trade	21	57	9	69	22	178	17.42%
Transportation and Ware..	2	2	0	1	2	7	0.68%
Information	1	6	3	8	2	20	1.96%
Finance and Insurance	6	31	3	9	16	65	6.36%
Real Estate and Rental an..	10	17	2	10	18	57	5.58%
Professional, Scientific, a..	9	39	1	12	14	75	0.00%
Management of Companie..	0	0	0	0	0	0	3.03%
Administrative and Suppo..	4	11	1	10	5	31	3.03%
Educational Services	3	9	2	11	4	29	2.84%
Health Care and Social As..	25	85	1	22	20	153	14.97%
Arts, Entertainment, and ..	1	5	0	4	2	12	1.17%
Accommodation and Food..	8	40	9	43	24	124	12.13%
Other Services (except Pu..	34	33	3	61	17	148	14.48%
Public Administration	9	8	10	5	0	32	3.13%
All Industries	147	373	50	294	158	1,022	100.00%

Distribution of Responses within Zones

Every zone in the survey received at least 9 responses with Zone 4 having the highest concentration at 32.

Graph 1: Distribution of Business Responses (by Zone)



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Business Size

The employee counts of businesses represented in this survey were generally small, with 74.3% of all respondents indicating they employed 10 or fewer full-time employees. In general, the size of the businesses surveyed were consistent with the general representation of business size within the region.

For example, nearly 75% of respondents indicated their business had 10 or fewer FTEs. The general business census of the area showed an exactly equal proportion of businesses with fewer than 10 FTEs at 75% of the total.

Graph 2: Overall FTEs, All Respondents

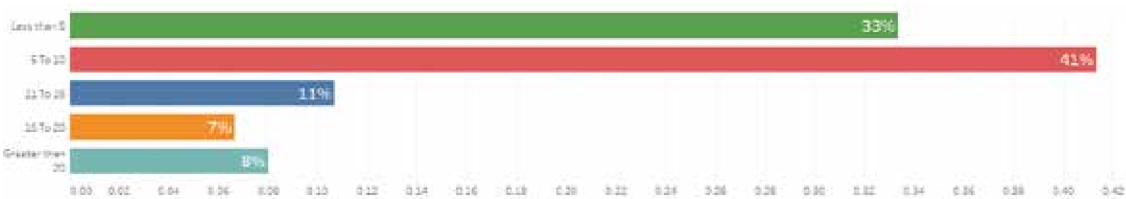

Table 3: Overall FTEs, All Respondents

	Less than 5	5 To 10	11 To 15	16 To 20	Greater than 20	Totals
Zone 1	27%	55%	9%	9%	0%	11
Zone 2	31%	13%	13%	13%	31%	16
Zone 3	13%	88%	0%	0%	0%	8
Zone 4	42%	35%	16%	3%	3%	31
Zone 5	33%	56%	0%	11%	0%	9
All Zones	33%	41%	11%	7%	8%	75

Table 4: Overall FTEs, Business Census

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total	% Total
1 to 4	84	187	13	164	97	545	51.5%
5 to 9	41	96	11	64	37	249	23.5%
10 to 19	13	41	11	46	10	121	11.4%
20 to 49	8	41	11	20	11	91	8.6%
50 to 99	5	14	3	6	1	29	2.7%
100 to 249	2	9	1	3	5	20	1.9%
250 to 499	1	1	0	1	0	3	0.3%
500 to 999	0	0	1	0	0	1	0.1%
Total	154	389	51	304	161	1,059	100.0%

Business Age

Business age was relatively evenly distributed amongst the selections. The most common selection with 24.7% of the total was 0-5 years in business. The next most represented category was 11-20 years in business at 23.3% of the total.

Graph 3: Years in Business, All Respondents

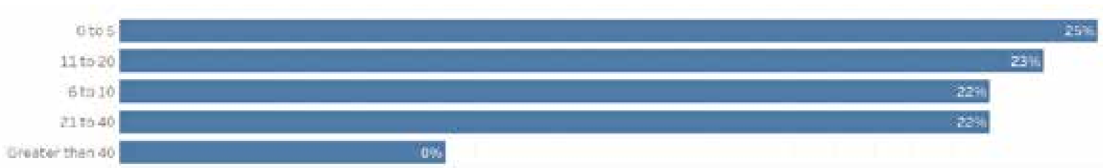

Table 5: Years in Business, All Respondents

Years in Business	Percentages	Total Responses
0 to 5	24.7%	18
6 to 10	21.9%	16
11 to 20	23.3%	17
21 to 40	21.9%	16
Greater than 40	8.2%	6
Totals	100.0%	73

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Survey Results

Q1: Please choose whether or not the following items are currently working well for your business.

Question 1 is a multifaceted question that asked respondents to rank how certain elements along Martin Way are currently meeting the needs of their business. Respondents were asked to choose between one of three options:

- Working well for my business (highest)
- Neutral
- Needs Improvement (lowest)

Businesses were asked to choose the above options across 14 different elements relating to the Martin Way corridor. The full list of elements is as follows:

- Access by car to business from Martin Way
- Access by car from business to Martin Way (eg left turns)
- Access by bicycle
- Pedestrian access (sidewalks, walkways)
- Access by bus
- Amount of parking
- Location or layout of parking
- Lighting
- Landscaping
- Traffic conditions on Martin Way
- Amenities such as parks or paths
- Access for persons with disability
- Nearby housing
- Overhead cost

Q1.1 Access by car to business from Martin Way

"Working well" was the most commonly selected option across all zones. Respondents in Zone 2 were most likely to select working well for their business when compared to other zones at 66.7%. Of businesses that selected "Needs Improvement", Zone 3 had the highest concentration at 33.3%.

Graph 4: Access by Car to Business from Martin Way

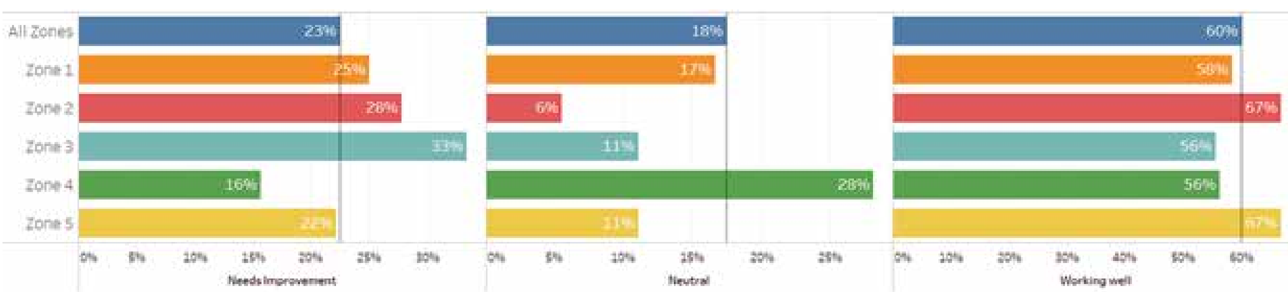

Table 6: Access by Car to Business from Martin Way

	Needs Improvement	Neutral	Working well	Total Responses
Zone 1	25.0%	16.7%	58.3%	12
Zone 2	27.8%	5.6%	66.7%	18
Zone 3	33.3%	11.1%	55.6%	9
Zone 4	15.6%	28.1%	56.3%	32
Zone 5	22.2%	11.1%	66.7%	9
All Zones	22.5%	17.5%	60.0%	80

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Q1.2 Access by car to Martin Way from Business (eg left turn safety)

Respondents identified left turn safety as a need for improvement across all zones and was the most common response across a majority of zones. The highest rating for left turn safety came from Zone 1 where 58.3% indicated it was “working well”. Zones 3 and 5 represented the areas where responses most indicated the need for improvement with 55.6% of respondents selecting “needs improvement”.

Graph 5: Access by car from business to Martin Way

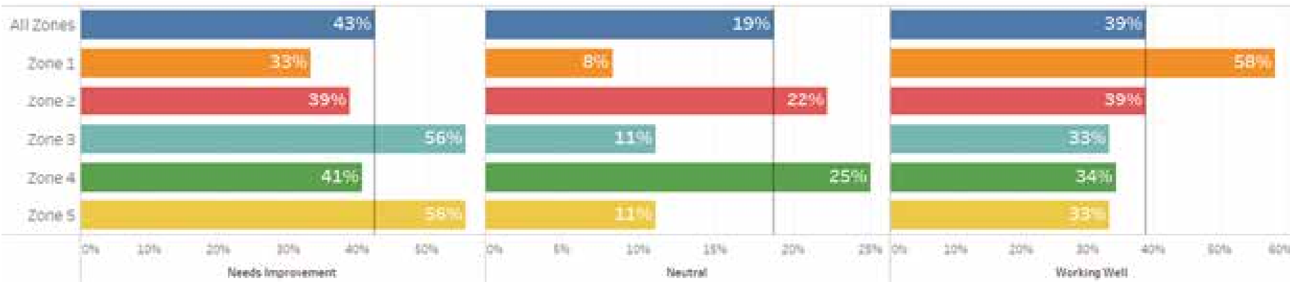

Table 7: Access by car from business to Martin Way

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	33%	8%	58%	12
Zone 2	39%	22%	39%	18
Zone 3	56%	11%	33%	9
Zone 4	41%	25%	34%	32
Zone 5	56%	11%	33%	9
All Zones	43%	19%	39%	80

Q1.3 Access by bicycle

“Working well” was the most represented selection across all zones and highest in Zone 5 at 77.8%. Zone 5 had the highest concentration of businesses that selected “needs improvement” at 22.2%

Graph 6: Access by Bicycle

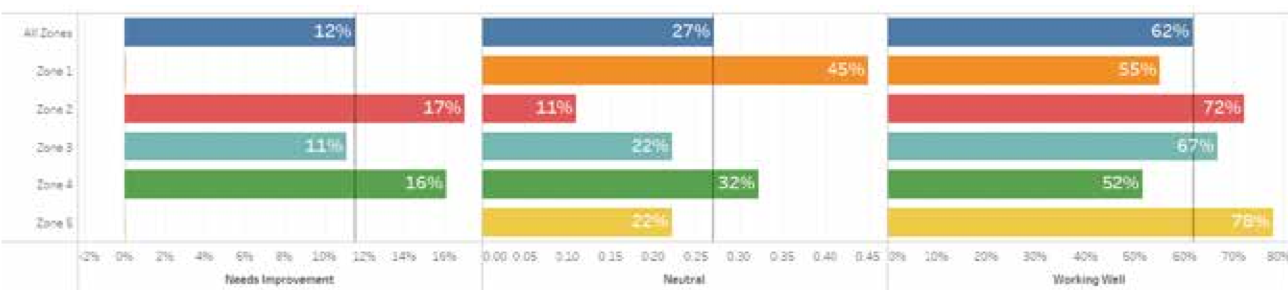

Table 8: Access by Bicycle

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	0%	45%	55%	11
Zone 2	17%	11%	72%	18
Zone 3	11%	22%	67%	9
Zone 4	16%	32%	52%	31
Zone 5	0%	22%	78%	9
All Zones	12%	27%	62%	78

Q1.4 Access by Pedestrian

Businesses in all zones indicated that pedestrian access was working well for their business. The highest satisfaction rating was in Zone 1 with 91.7% selecting "working well". The most dissatisfied zones were Zones 2 and 3 with both having 22.2% selecting "needs improvement".

Graph 7: Access by Pedestrians

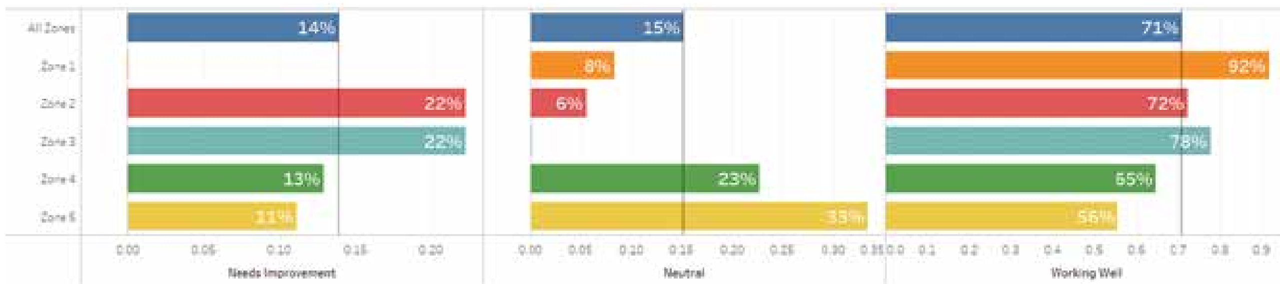

Table 9: Access by Pedestrians

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	0%	8%	92%	12
Zone 2	22%	6%	72%	18
Zone 3	22%	0%	78%	9
Zone 4	13%	23%	65%	31
Zone 5	11%	33%	56%	9
All Zones	14%	15%	71%	79

Q1.5 Access by Bus

The majority of zones responded that access by bus was working well for their business. The zone with the highest satisfaction was Zone 1 with 91.7% selecting "working well". The zone with the highest dissatisfaction was Zone 5 with 44.4% selecting "needs improvement".

Graph 8: Access by Bus

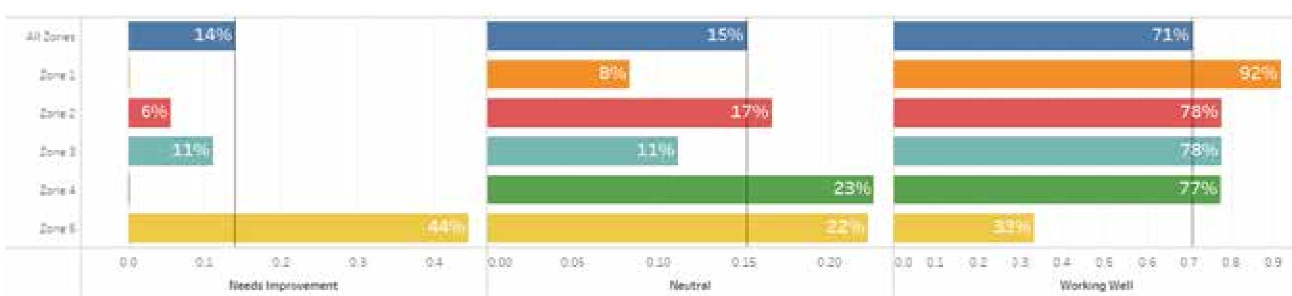

Table 10: Access by Bus

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	0%	8%	92%	12
Zone 2	6%	17%	78%	18
Zone 3	11%	11%	78%	9
Zone 4	0%	23%	77%	31
Zone 5	44%	22%	33%	9
All Zones	14%	15%	71%	79

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Q1.6 Amount of Parking

Respondents indicated that the amount of parking available to them was working well in all of the zones surveyed. The highest concentration of positive responses was in Zone 3 with 88.9% selecting "working well" and the highest concentration of negative responses was in Zone 1 with 33.3% selecting "needs improvement".

Graph 9: Amount of Parking

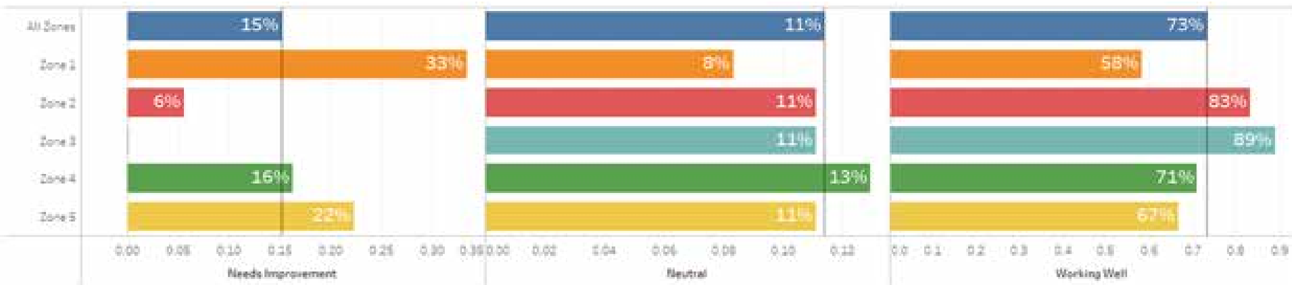

Table 11: Amount of Parking

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	33%	8%	58%	12
Zone 2	6%	11%	83%	18
Zone 3	0%	11%	89%	9
Zone 4	16%	13%	71%	31
Zone 5	22%	11%	67%	9
All Zones	15%	11%	73%	79

Q1.7 Location and Layout of Parking

The majority of respondents in each zone indicated that parking location and layout were working well for their business. The highest concentration of positive responses was located within Zone 2 at 72.2%. The highest concentration of negative responses were tied between Zones 1 and 2 with 16.7% in each selecting "needs improvement".

Graph 10: Location and Layout of Parking

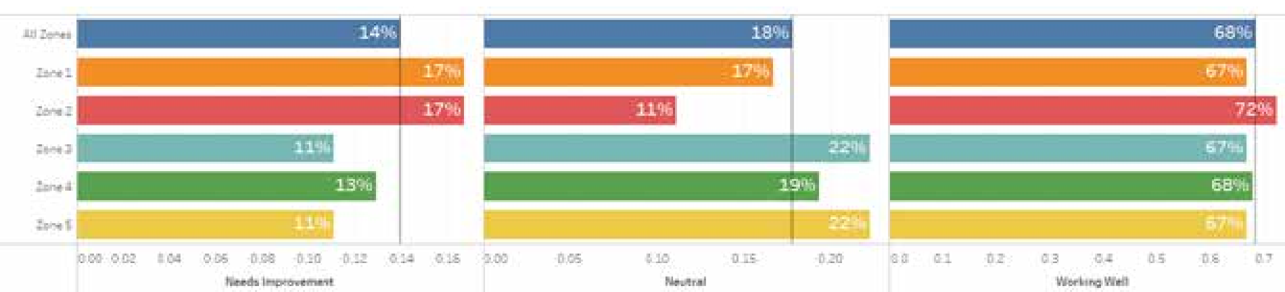

Table 12: Location and Layout of Parking

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	17%	17%	67%	12
Zone 2	17%	11%	72%	18
Zone 3	11%	22%	67%	9
Zone 4	13%	19%	68%	31
Zone 5	11%	22%	67%	9
All Zones	14%	18%	68%	79

Q1.8 Quality of Lighting

The majority of respondents indicated that the quality of lighting was working well for their business with 4 out of 5 zones indicating that as their primary selection. The highest concentration of positive responses was within Zone 2 with 61.1% selecting "working well" and the highest concentration of negative responses was located with Zone 1 with 41.7% selecting "needs improvement".

Graph 11: Quality of Lighting

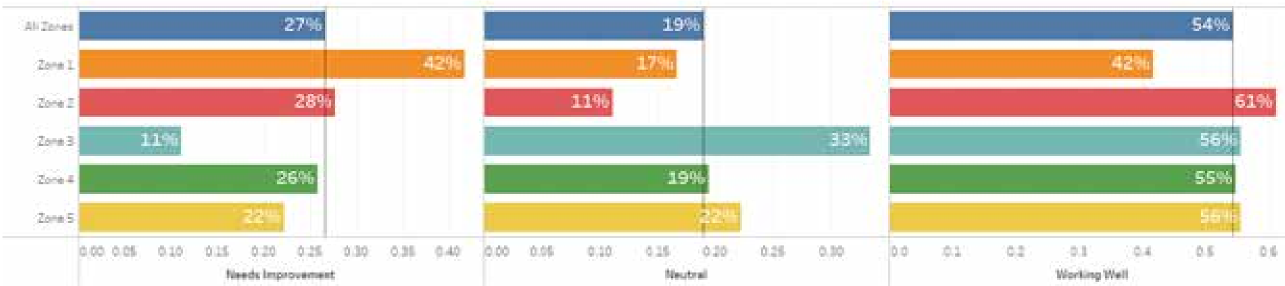

Table 13: Quality of Lighting

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	42%	17%	42%	12
Zone 2	28%	11%	61%	18
Zone 3	11%	33%	56%	9
Zone 4	26%	19%	55%	31
Zone 5	22%	22%	56%	9
All Zones	27%	19%	54%	79

Q1.9 Quality of Landscaping

The majority of respondents indicated that the quality of landscaping was working well for their business. The highest concentration of positive responses were in Zone 2 where 61.1% of respondents selected that landscaping was "working well". The highest concentration of negative responses were located in Zone 3 where 44.4% indicated that landscaping "needs improvement".

Graph 12: Quality of Landscaping

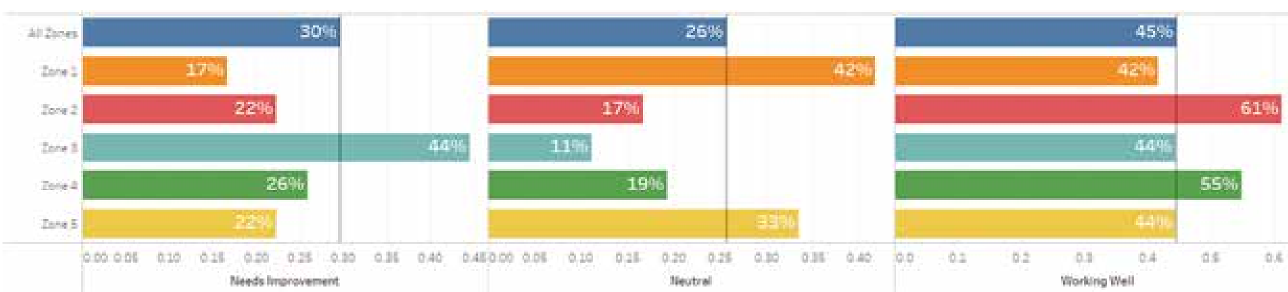

Table 14: Quality of Landscaping

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	17%	42%	42%	12
Zone 2	22%	17%	61%	13
Zone 3	44%	11%	44%	9
Zone 4	26%	19%	55%	31
Zone 5	22%	33%	44%	9
All Zones	30%	26%	45%	74

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Q1.10 Traffic Conditions

Respondents were split on their perception of traffic conditions, but most zones indicated that traffic conditions were an issue. The highest concentration of positive responses were located within Zone 1 with 91.7% indicating traffic conditions were "working well". The highest concentration of negative responses were from Zone 2 where 38.9% indicated that traffic conditions "need improvement".

Graph 13: Traffic Conditions

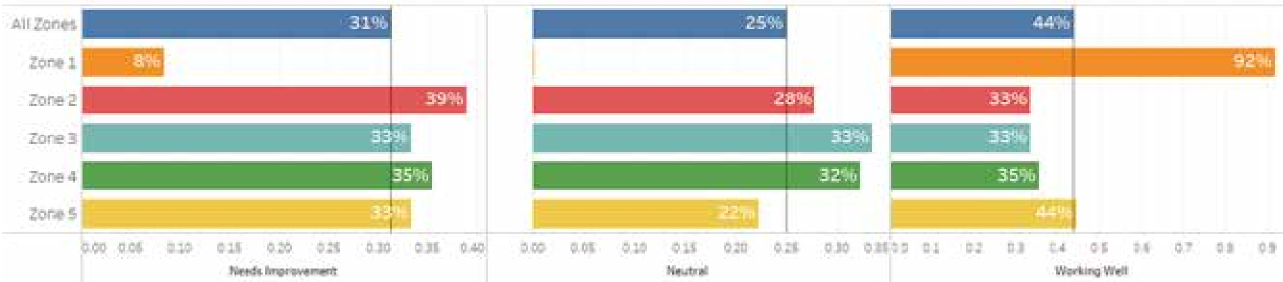

Table 15: Traffic Conditions

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	0%	92%	12
Zone 2	39%	28%	33%	18
Zone 3	33%	33%	33%	9
Zone 4	35%	32%	35%	32
Zone 5	33%	22%	44%	9
All Zones	31%	25%	44%	80

Q1.11 Parks and Paths

Respondents were primarily neutral when considering the condition of parks and paths provided along Martin Way. Zone 2 contained both the highest concentration of positive and negative perceptions with 33.3% indicating they were "working well" and 38.9% indicated "needs improvement".

Graph 14: Parks and Paths

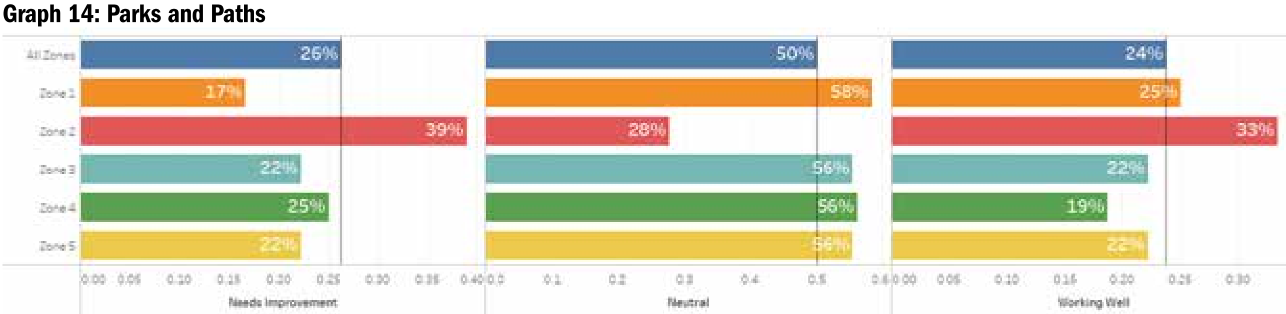

Table 16: Parks and Paths

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	17%	58%	25%	12
Zone 2	39%	28%	33%	18
Zone 3	22%	56%	22%	9
Zone 4	25%	56%	19%	32
Zone 5	22%	56%	22%	9
All Zones	26%	50%	24%	80

Q1.12 Access for Persons with Disability

Respondents indicated that access for persons with disability was working well for their business across all surveyed zones. The highest concentration of positive feedback was located in Zone 1 with 75% of respondents selecting "working well". The highest concentrations of negative responses were located within Zones 3 and 4 with 11.1% selecting "needs improvement".

Graph 15: Access for Persons with Disability

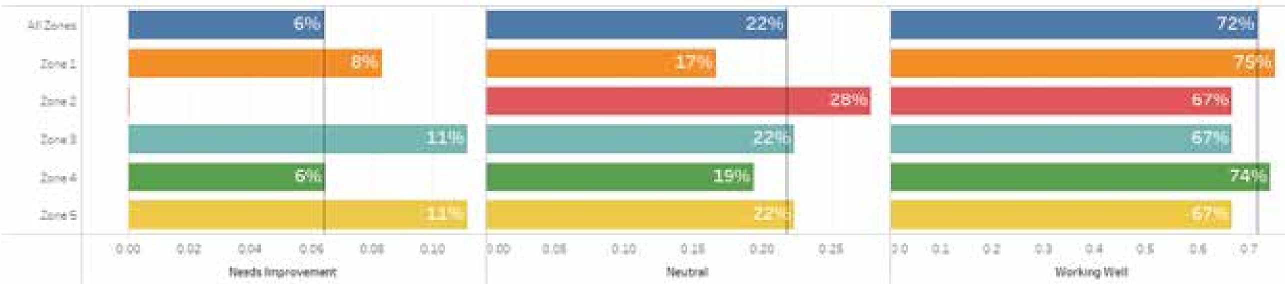

Table 17: Access for Persons with Disability

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	17%	75%	12
Zone 2	0%	28%	67%	17
Zone 3	11%	22%	67%	9
Zone 4	6%	19%	74%	31
Zone 5	11%	22%	67%	9
All Zones	6%	22%	72%	78

Q1.13 Housing Nearby

Respondents were primarily neutral when assessing the nearby housing stock.

Graph 16: Housing Nearby

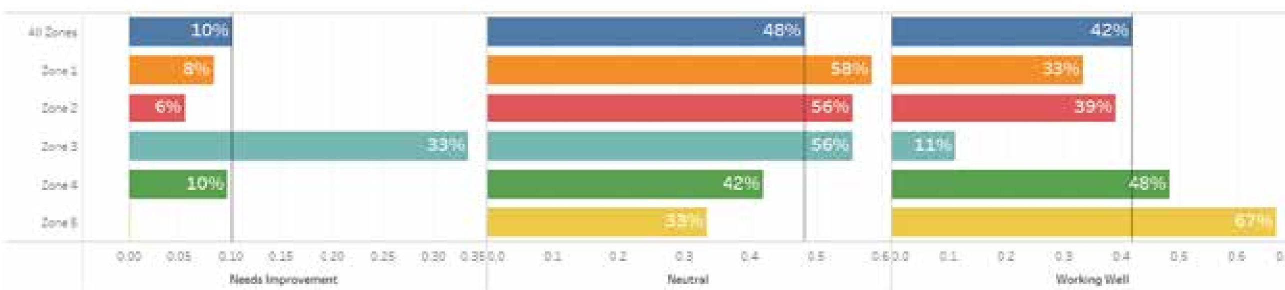

Table 18: Housing Nearby

	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	58%	33%	12
Zone 2	6%	56%	39%	18
Zone 3	33%	56%	11%	9
Zone 4	10%	42%	48%	31
Zone 5	0%	33%	67%	9
All Zones	10%	48%	42%	79

Q1.14 Overhead Costs

Respondents were primarily neutral about the condition of overhead costs. The zone with the highest concentration of positive responses was Zone 1 with 41.7% indicating overhead costs were "working well". The highest concentration of negative responses was Zone 5 where 22.2% indicated that overhead costs "need improvement".

Graph 17: Overhead Costs

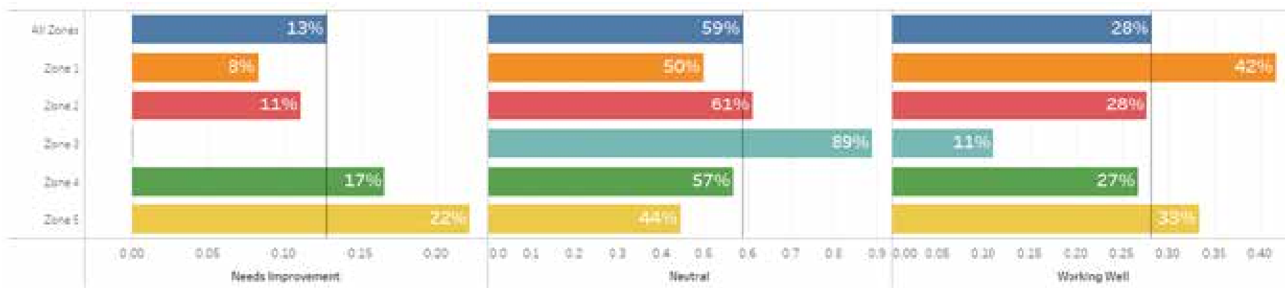

Table 19: Overhead Costs

Zones	Needs Improvement	Neutral	Working Well	Total Responses
Zone 1	8%	50%	42%	12
Zone 2	11%	61%	28%	18
Zone 3	0%	89%	11%	9
Zone 4	17%	57%	27%	30
Zone 5	22%	44%	33%	9
All Zones	13%	59%	28%	78

Q1.15 Open Response: Items Needing Improvement

Respondents were asked to provide clarity on why they selected "needs improvement" in the questions above. General themes for each zone are detailed below. A full list of responses can be found in Appendix 1.

Zone 1 Themes

A main concern for businesses in this zone was the safety of driving on Martin Way with many businesses commenting that they did not feel safe turning right or left onto Martin Way due to traffic conditions. Traffic accidents are mentioned as common and contribute to a general feeling of poor access to and from their businesses.

Respondents indicated concern over the amount of lighting and expressed a desire to see additional lighting on the street itself.

Homelessness was a consistent theme across all zones and many businesses expressed concerns of safety and blight around their businesses.

Access to parking was commonly mentioned with several businesses commenting that their access to parking was limited for the customers and their employees.

Zone 2 Themes

The most commonly represented concern by respondents was concern about the safety of left turns and the poor condition of traffic, generally. Many businesses expressed that their businesses are unsafe to enter for customers arriving by foot or bicycle and that car accidents are common.

Some businesses represented concerns about the availability of lighting and parks and pathways near their business.

Zone 3 Themes

The most common concern respondents had was related to traffic safety and access to and from their business. Several businesses indicated that traffic conditions along Martin Way simply do not allow for left turns to be conducted safely.

Homelessness, the quality of bike lanes and pedestrian paths were mentioned, but did not represent a significant portion of open responses in this zone.

Zone 4 Themes

Poor lighting and landscaping were consistently represented by respondents within this zone and some businesses were able to connect lack of proper lighting to safety concerns.

Road safety was the most commonly represented concern with traffic conditions and difficult left-turns mentioned most frequently. Many businesses feel that entering and exiting their development itself poses a significant danger to themselves and their customers.

Some businesses mentioned their desire for additional parks and pathways and dislike the general blight of the area.

Zone 5 Themes

Access by bus was represented as concern with some businesses mentioning that their business is poorly served by the bus.

Lighting and landscaping concerns were represented, but not uniformly across all respondents.

Traffic conditions and left-turn safety were the most commonly represented concerns. Traffic is seen as "bad" and a significant cause of concern for employee and customer safety.

Q2: Size of Business

The vast majority of businesses surveyed were small businesses with FTE counts of less than 10. Zone 3 represented the highest concentration of small business responses with 100% of all respondents indicating they had 10 or fewer employees.

Graph 18: Number of FTEs, All Respondents by Zone

Table 20: Number of FTEs

	Less than 5	5 To 10	11 To 15	16 To 20	Greater than 20	Totals
Zone 1	27%	55%	9%	9%	0%	11
Zone 2	31%	13%	13%	13%	31%	16
Zone 3	13%	88%	0%	0%	0%	8
Zone 4	42%	35%	16%	3%	3%	31
Zone 5	33%	56%	0%	11%	0%	9
All Zones	33%	41%	11%	7%	8%	75

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Q3 Years located on Martin Way

Respondent business age was varied across zones with no clear category dominating overall.

Graph 19: Age of Business

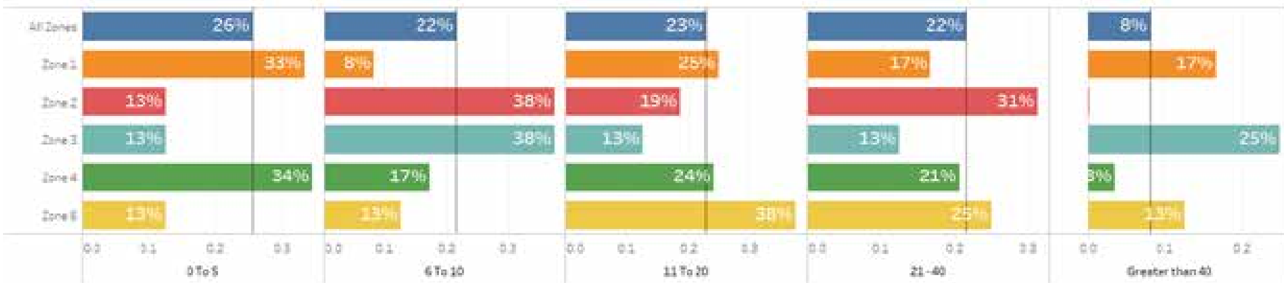

Table 21: Age of Business

	0 To 5	11 To 20	21 - 40	6 To 10	Greater than 40	Totals
Zone 1	33%	25%	17%	8%	17%	12
Zone 2	13%	19%	31%	38%	0%	17
Zone 3	13%	13%	13%	38%	25%	8
Zone 4	34%	24%	21%	17%	3%	29
Zone 5	13%	38%	25%	13%	13%	8
All Zones	26%	23%	22%	22%	8%	74

Q4 Open Response: Why did you originally locate your business on Martin Way?

Respondents were asked in an open response to explain why their business was originally located along Martin Way. A collection of general themes by zone are presented below. The full list of responses is included in Appendix 1.

Zone 1 Themes

The most commonly represented response was that no strong reason was responsible for locating their business in this area or that their location choice was unknown.

The next most common reason was the land or building available was suited to the needs of the business.
Traffic flow and access to I-5 was mentioned by a minority of respondents

Zone 2 Themes

The most common response within Zone two was related to location. Many businesses indicated they chose to locate their business in this area of Martin Way due to proximity to I-5, drive by traffic, to have access to state workers and be near the hospital.

Zone 3 Themes

The majority of respondents Zone 3 opted not to answer this question, but those who did mentioned visibility from the road and building availability as a primary reason.

Zone 4 Themes

The most commonly represented reason for locating their business in this area was related to visibility and the highly trafficked street.

Some respondents mentioned they wanted to be part of the immediate community in that area of Lacey and chose their locations based on affordability and the quality of the buildings available to them.

Access to I-5 and housing were also represented as important.

Zone 5 Themes

Cost and proximity to Martin Way were the primary reasons mentioned by respondents within Zone 5.

Q5 Open Response: Why have you continued to locate your business along Martin Way?

Respondents were asked in an open response to explain why they continue to locate their business along Martin Way. General themes represented for each zone are detailed below. The entire collection of responses for this question are included in Appendix 1.

Zone 1 Themes

The most common response in Zone 1 was related to location. Respondents indicated they preferred being close to the high number of cars driving by, proximity to I-5 and a lack of affordable alternatives.

Zone 2 Themes

Respondents in Zone 2 indicated that location was the primary reason they choose to locate along Martin Way. High visibility and access to drive-by traffic were significant contributors.

Zone 3 Themes

A small number of businesses in Zone 3 responded to this question, but those who did emphasized Martin Way's great visibility and the locations of their buildings as being their primary motivation to stay.

Zone 4 Themes

Respondents commonly indicated they remain at their current location due to its excellent visibility and the high drive-by traffic. Proximity to I-5 and nearby housing were mentioned.

A small number of respondents indicated that they would move, but fear losing their customer base.

Zone 5 Themes

Visibility from the road, easy access and cost were consistent themes across Zone 5.

Q6: From the perspective of retaining a quality workforce how important are the following?

Respondents were asked to rank the importance of the following elements to their business from the perspective of retaining a quality workforce:

- Convenient bus service
- Easy Car Access
- Convenient Bicycle Access
- High Quality Pedestrian Walkways

Respondents were asked to choose between the following responses:

- Important
- Neutral
- Not Important

Q6.1 Convenient Bus Service (Workforce)

Respondents were split on their belief that convenient bus service was important. The highest concentration of support came from respondents in Zone 2 with 70.6% selecting “important”. The lowest concentration of support came by way of Zone 3 where 55.6% of respondents selected “not important”.

Graph 20: Convenient Bus Service (Workforce)

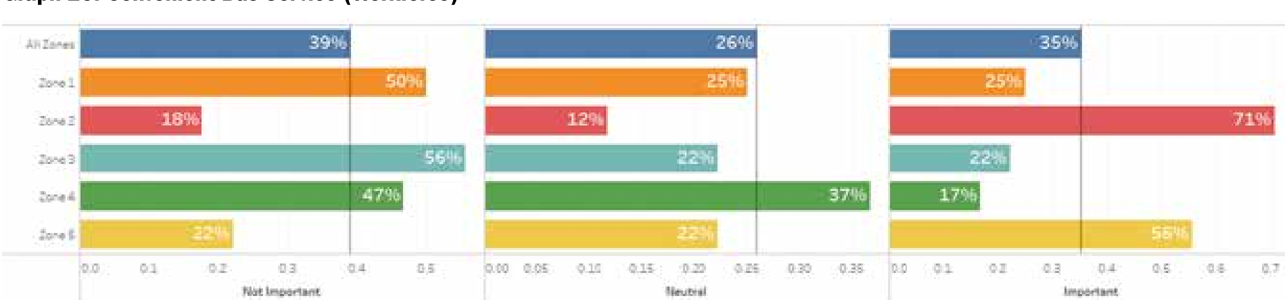

Table 22: Convenient Bus Service (Workforce)

	Important	Neutral	Not Important	Total Responses
Zone 1	25%	25%	50%	12
Zone 2	71%	12%	18%	17
Zone 3	22%	22%	56%	9
Zone 4	17%	37%	47%	30
Zone 5	56%	22%	22%	9
All Zones	35%	26%	39%	77

Q6.2 Easy Car Access (Workforce)

The importance of easy car access was communicated uniformly across all zones. The highest concentration of support came from Zones 1 and 5 with 100% of respondents selecting "important". The lowest concentration of support came from Zone 2 with 83.3% selecting important.

Graph 21: Importance of Easy Car Access (Workforce)

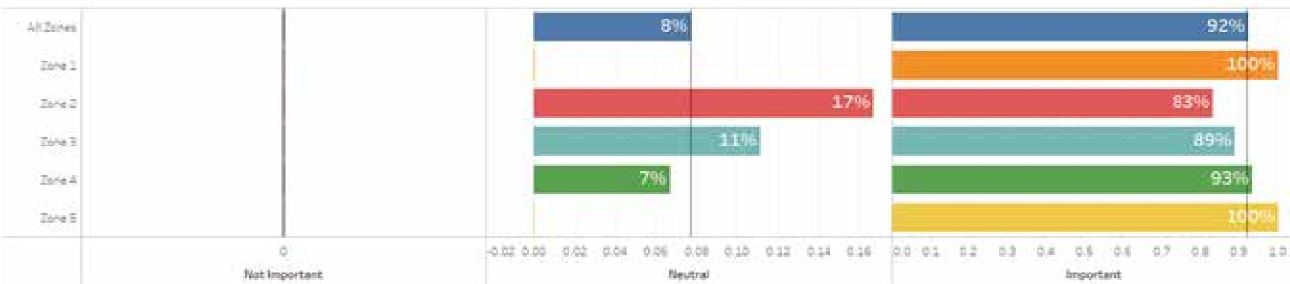

Table 23: Importance of Easy Car Access (Workforce)

	Not Important	Neutral	Important	Total Responses
Zone 1	0%	0%	100%	12
Zone 2	0%	17%	83%	18
Zone 3	0%	11%	89%	9
Zone 4	0%	7%	93%	30
Zone 5	0%	0%	100%	9
All Zones	0%	8%	92%	78

Q6.3 Importance of Bicycle Access (Workforce)

The majority of respondents indicated that bicycle access was not of major importance for their business with Zone 2 being the only exception at 64.3% indicating it as "important". The lowest concentration of support came from Zone 3 where 77.8% of respondents selected "not important".

Graph 22: Importance of Bicycle Access (Workforce)

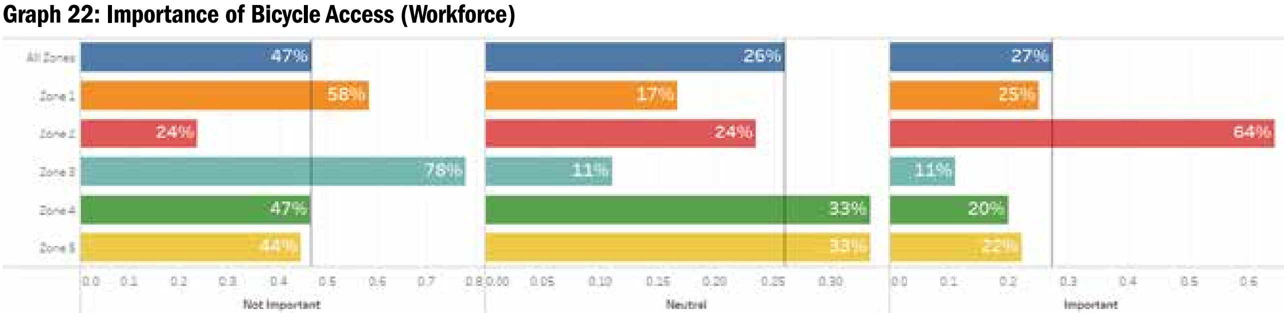

Table 24: Importance of Bicycle Access (Workforce)

	Not Important	Neutral	Important	Total Responses
Zone 1	58%	17%	25%	12
Zone 2	24%	24%	64%	17
Zone 3	78%	11%	11%	9
Zone 4	47%	33%	20%	30
Zone 5	44%	33%	22%	9
All Zones	47%	26%	27%	77

Q6.4 Importance of Good Pedestrian Walkways (Workforce)

Respondents were split on the importance of quality walkways, but the majority indicated they were important to their business. The highest concentration of support was indicated in Zone 2 where 58.8% selected "important". The lowest concentration of support came from Zone 4 where 36.7% selected "not important".

Graph 23: Importance of Good Walkways (Workforce)

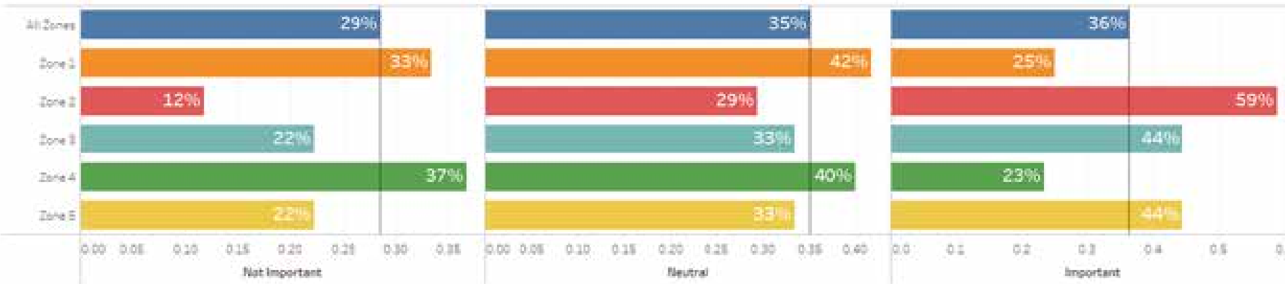

Table 25: Importance of Good Walkways (Workforce)

	Not Important	Neutral	Important	Total Responses
Zone 1	33%	42%	25%	12
Zone 2	12%	29%	59%	17
Zone 3	22%	33%	44%	9
Zone 4	37%	40%	23%	30
Zone 5	22%	33%	44%	9
All Zones	29%	35%	36%	77

Q7 From the perspective of your regular customers, how important are the following?

Respondents were asked to rank the importance of the following elements to their business from the perspective of retaining a quality workforce:

- Convenient bus service
- Easy Car Access
- Convenient Bicycle Access
- High Quality Pedestrian Walkways

Respondents chose between the following options:

- Not Important
- Neutral
- Important

Q7.1 Convenient Bus Access (Customers)

Respondents were split on the importance of bus access for their customers, but the majority indicated it was an important element for their business. The highest concentration of support came from respondents within Zone 2 with 70.6% selecting "important". The highest concentration of lack of support for bus service came from Zone 1 with 58.3% selecting "not important".

Graph 24: Importance of Bus Access (Customers)

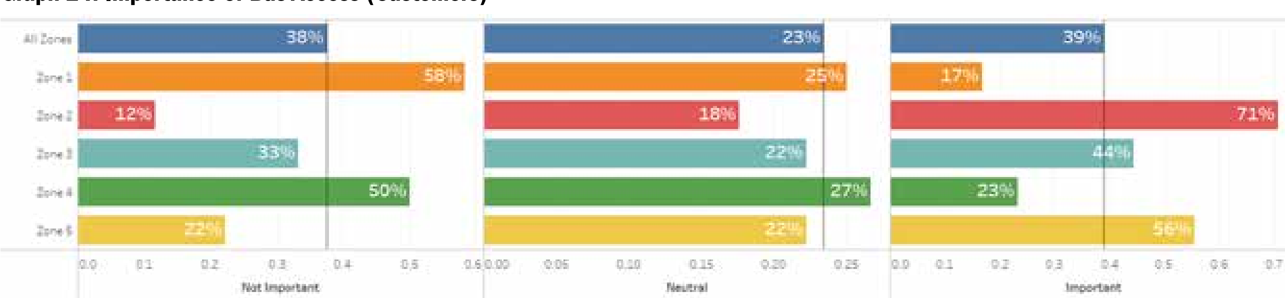

Table 26: Importance of Bus Access (Customers)

	Important	Neutral	Not Important	Total Responses
Zone 1	17%	25%	58%	12
Zone 2	71%	18%	12%	17
Zone 3	44%	22%	33%	9
Zone 4	23%	27%	50%	30
Zone 5	56%	22%	22%	9
All Zones	39%	23%	38%	77

Q7.2 Convenient Car Access (Customers)

Respondents across all zones were uniform in their selection of car access being important for their customers with 100% of Zone 3 and 5 selecting "important".

Graph 25: importance of Car Access (Customers)

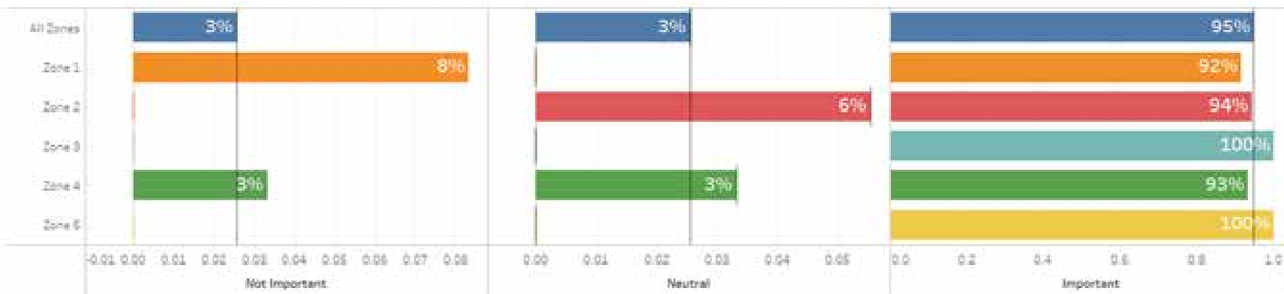

Table 27: importance of Car Access (Customers)

	Not Important	Neutral	Important	Total Responses
Zone 1	8%	0%	92%	12
Zone 2	0%	6%	94%	18
Zone 3	0%	0%	100%	9
Zone 4	3%	3%	93%	30
Zone 5	0%	0%	100%	9
All Zones	3%	3%	95%	78

Q7.3 Importance of Bicycle Access (Customers)

Respondents were split on the importance of bicycle access but the majority of respondents selected that it was not important for their customers. The highest concentration of responses selecting "important" came from Zone 2 with 61.1% indicating so. Zone 1 had the highest concentration of "not important" responses at 66.7%.

Graph 26: Importance of Bicycle Access (Customers)

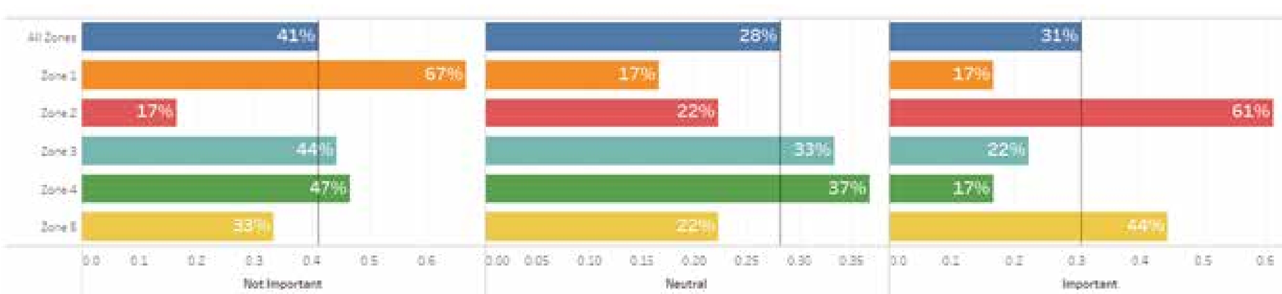

Table 28: Importance of Bicycle Access (Customers)

	Important	Neutral	Not Important	Total Responses
Zone 1	17%	17%	67%	12
Zone 2	61%	22%	17%	18
Zone 3	22%	33%	44%	9
Zone 4	17%	37%	47%	30
Zone 5	44%	22%	33%	9
All Zones	31%	28%	41%	78

Q7.4 Importance of Good Walkways (Customers)

Respondents were split on the importance of pedestrian walkways across zones. Zone 2 had the highest concentration of support with 72.2% indicating they were "important". Zone 3 had the highest concentration of respondents that selected "not important" at 58.3%.

Graph 27: Importance of Good Walkways (Customers)

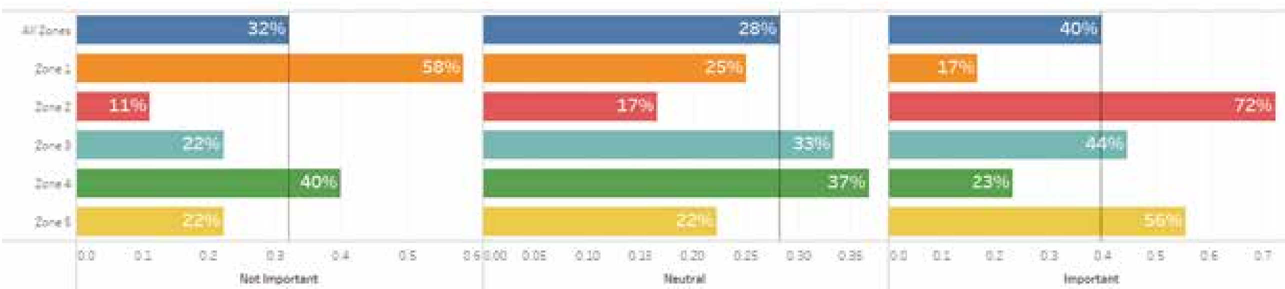

Table 29: Importance of Good Walkways

	Not Important	Neutral	Important	Total Responses
Zone 1	58%	25%	17%	12
Zone 2	11%	17%	72%	18
Zone 3	22%	33%	44%	9
Zone 4	40%	37%	23%	30
Zone 5	22%	22%	56%	9
All Zones	32%	28%	40%	78

Q8 Which of the following are most important to your business (select 3)

- Access by car
- Access for freight/deliveries
- Access by bicycle
- Access by pedestrians
- Access by bus
- Amount of parking space
- Location or layout of parking
- Lighting
- Landscaping
- Traffic conditions
- Amenities (parks & paths)
- Low overhead costs
- Housing nearby

Respondents were asked to select the three most important elements to their business (in no order) from the following elements: Respondents in Zone 1 most frequently selected "access by car" as an important element to the success of their business with 75% of respondents selecting it. The next most selected response was "traffic conditions".

67% Respondents in Zone 2 chose "access by car" as one of the most important elements to the success of their business making it the most common choice. The next most common selection was "amount of parking space" with 33% of respondents selecting that option.

"Access by car" was again the most commonly selected item for businesses in Zone 3 at 67%. "Traffic conditions" were the next most common selection with 44% of businesses indicating it as important.

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In Zone 4, "access by car" was the most commonly selected item at 75% and "traffic conditions" the second most commonly selected item at 66%.

100% of all respondents selected "access by car" as important within Zone 5. Traffic conditions was the next most commonly selected item with 78% indicating it as important for their success.

Graph 28: Most Important Elements to Business Success, Total Responses

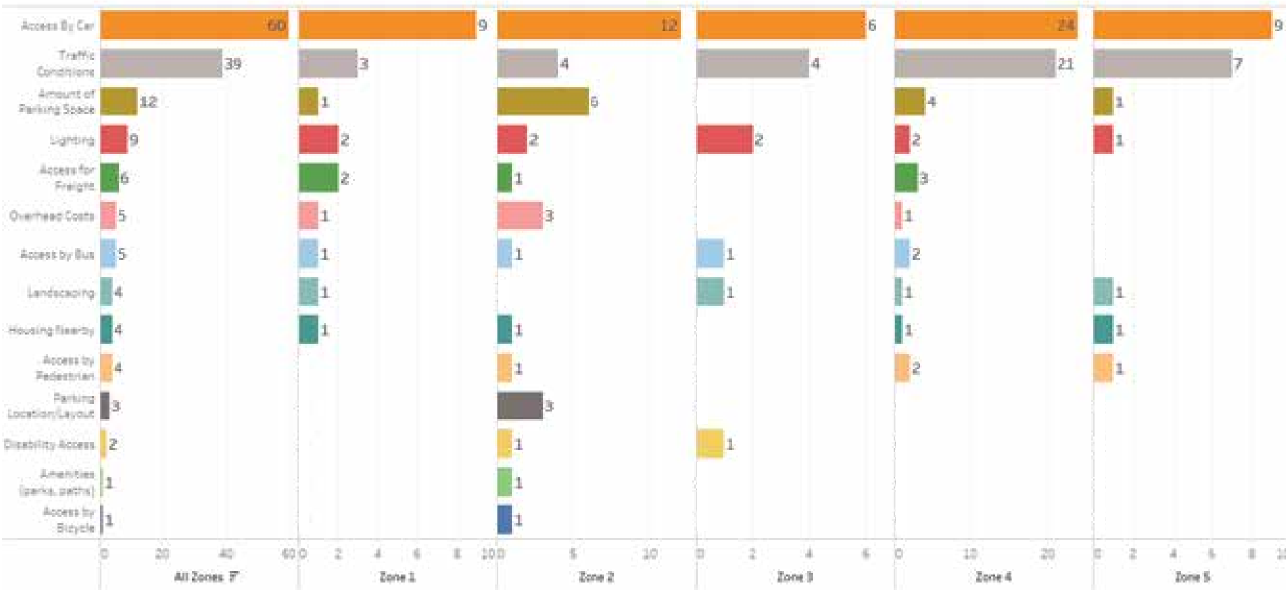

Table 30: Most Important Elements to Business Success, Total Responses

	All Zones	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Access by Bicycle	1	0	1	0	0	0
Access by Bus	5	1	1	1	2	0
Access By Car	60	9	12	6	24	9
Access by Pedestrian	4	0	1	0	2	1
Access for Freight	6	2	1	0	3	0
Amenities (parks, paths)	1	0	1	0	0	0
Amount of Parking Space	12	1	6	0	4	1
Disability Access	2	0	1	1	0	0
Housing Nearby	4	1	1	0	1	1
Landscaping	4	1	0	1	1	1
Lighting	9	2	2	2	2	1
Overhead Costs	5	1	3	0	1	0
Parking Location/Layout	3	0	3	0	0	0
Traffic Conditions	39	3	4	4	21	7

100% of all respondents selected "access by car" as important within Zone 5. Traffic conditions was the next most commonly selected item with 78% indicating it as important for their success.

Q9 Open Response: Explanation of Q8 Selection

Respondents were asked to explain their selections from question 8. General themes across zones included:

- Importance of access by car
- Importance of traffic conditions
- Concern for safety when driving & turning

A complete list of responses is included in Appendix 1

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Q10 Open Response: What would you like to see added to Martin Way in the future?

Respondents were asked to provide suggestion on what elements they would like to see added to Martin Way in the future. Below represents a summary of comments in each zone. A full list of responses can be found in Appendix 1.

Zone 1 Themes

Concern about homelessness and homeless activity was the single most common suggestion from respondents in Zone 1.

Some respondents indicated their desire for general beautification and landscaping improvements.

Zone 2 Themes

Concern about homelessness was a primary suggestion from businesses in Zone 2.

Traffic conditions were identified as an area for improvement.

Better lighting and beautification services were suggested.

Zone 3 Themes

Concern about homelessness and homeless activity was a primary concern for businesses in Zone 3.

Other concerns mentioned were in relation to lighting, bus stop access and a dislike of roundabouts, but these concerns were not commonly represented in Zone 3.

Zone 4 Themes

Street improvements were a common suggestion. Respondents indicated there is often debris on Martin Way or that street markings are not clearly visible.

A desire for “better” traffic lights including changing left turn lights from blinking yellow to protected green arrows.

Better lighting, landscaping and beautification was commonly referenced.

Zone 5 Themes

Suggestions around improving traffic congestion were common in this zone.

Q11: What Percentage of your Workforce is Currently Working from Home?

The vast majority of businesses surveyed had few or no workers currently working from home. This result is consistent with what we would expect given that the most commonly represented industry sector was Retail Trade and the next most common Accommodation and Food Service.[3] Zone 3 had the highest presence of remote working with an average of 11.7% currently working from home.

Graph 29: Average Workforce Currently Working from Home

Table 31: Average Workforce Currently Working from Home

Zone 1	0.00%
Zone 2	1.35%
Zone 3	10.00%
Zone 4	2.93%
Zone 5	11.25%

[3] See Table 1 for a breakdown of industry representation by Zone.

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Appendix 1

Question 1.15: Open Response Items Needing Improvement

Respondents were asked to provide clarity on why they selected “needs improvement” in the questions above.

Zone 1

Need more lighting

Parking lot can only fit about 10 cars

They have a decent amount of lighting but more lights on the street would be helpful. Homeless problem is becoming a huge issue at their location and for their business

Need more parking space

Would be nice for a safe left-hand turn that does not need to go over double yellow lines

Difficult to turn in depending on which way you’re coming from martin way. Leaves using another street. No one comes in riding bikes.

Street lines make it illegal to turn left into business, also fairly difficult to leave so the only access is from one way. More parking space and the layout could be improved for easier access. Lighting and landscaping could be improved to help the aesthetic and make people feel safe especially when daylight hours are limited during the winter. Not many parks and paths. Expensive to operate in this area.

Access by car and traffic conditions: there are a lot of accidents around the area that can affect business as well as lots of traffic. Amount of parking and layout: Since we are next to other businesses they tend to take out parking spaces and can leave employees.

There are several eyesores near my business not the least of which is the Century link maintenance building on the corner of Devoe and Martin. I don’t expect much from the Holly Hotel but a multi-billion-dollar company such as CL should try harder to keep up the compound with small businesses like mine. Dilapidated vehicles for homeless people and homeless encampments are also just about everywhere near us. That really wears on us.

Zone 2

Median in the middle of the road makes it difficult to enter and exit location. Need more parking space and better layout of those parking spaces. Need more lighting and landscaping efforts, especially involving the cleaning up of garbage in the area. Not many parks or paths. Access for people with disabilities is difficult. The only housing nearby needs improvement. Overhead costs are rather expensive.

Traffic conditions get very hairy from time to time and there is definitely room for improvement in this area.

Difficult to turn left. Businesses are super far back from the road/sidewalk which would make it difficult for any customers on foot to enter/exit the location. Not enough lighting especially during early morning/night hours. Not many paths or any parks.

Landscaping could use some upkeep.

Difficult to leave the business due to occasional heavy traffic conditions.

Located in the middle of an intersection so it does not seem very safe to enter/exit on bike or foot. Traffic conditions can get really bad and there have been quite a few head-on collisions in the area. No parks or paths in the area, mainly surrounded by businesses.

Not many parks or paths in the area.

Difficult left run. Weird angle and layout. More lights, more landscaping. Bad traffic conditions between Sleater Kinney and College St.

Could use more lighting and landscaping help.

Traffic is always heavy. Left turns out of our driveway can be difficult. Left turns into our driveway can be difficult. I’m not sure what the solution is, however.

Leaving my office at Martin and lily. Specifically turning right onto Martin is a mess. Turning left is worse. It is dangerous anyway out. My address is 102 Lilly road. I see people pulling out in front of other people, narrowly missing pedestrians because they are so caught looking for a hole to pull out on. I am a very safe and careful driver and I have had that issue. The intersection of Lilly and Martin way is dangerous to access.

A left turn into our business office from Martin Way eastbound is difficult due to very short turn lane (traffic curb in center lane and driveway are too close to each other).

Zone 3

Weird shared parking lot with bar that makes parking odd to navigate. Landscaping is horrible, there are rocks all over the parking lot. Lighting in the front of the building is fine for this business, but there are about 6 other businesses in the building and the lighting out back is not great. Moving a homeless camp behind the location is not ideal.

Difficult to turn out because of unprotected left turn, causes a few accidents.

More landscaping on Martin Way could help customers see the signs and bank location better.

Difficult/impossible to turn left into the business location. Traffic gets extremely busy.

Lots of new traffic due to an increase of housing nearby makes it difficult to navigate entering and exiting the business premises   Not really any bike lanes or sidewalks nearby. Traffic conditions have gotten a lot worse. Increase of housing nearby has been inconvenient.

Very awkward for our business entrance. Our entrance is being shared with Denny's and super 8. There is only one entrance and exit. I think we need to have better way out and in.

Can be difficult to leave due to traffic conditions going left. Light timing could be better so a bunch of cars aren't getting backed up and causing traffic.

Zone 4

Need more lighting and landscaping needs to be kept up better on Martin Way. The ditches are overgrown in some areas and getting littered with garbage.

Depending on which way you are coming and going it is difficult to turn left to enter or exit the location. Same story for access by bike. Lighting on martin way needs a lot of improvement, it can be very dark in some spots. Too much housing nearby is contributing to the increase in traffic.

Hard to access by walking because pedestrians have to walk all the way down to the light or jaywalk for convenience, which is unsafe. Need more parking space and a more convenient layout of the parking space. Traffic conditions are horrible sometimes. Disability parking is inconveniently located on the premises and is kind of far away. Overhead costs are expensive.

Light on Kinwood and Martin is horrible and inconveniently only blinks yellow.

Traffic can be bad depending on the time of day.

Islands in the middle of the road make it inconvenient to leave the location. Doesn't like how the landscaping was put in the middle of the road.

Difficult left hand turn out of business. Overhead costs are expensive.

Hard turning left out of location but right is fine.

"everything is too expensive right now"

Essentially no lighting or landscaping, makes it difficult for customers arriving around 5pm in the winter to find the location. No parks or paths in the area.

Difficult left turn especially during rush hour or lunch time when there is a lot of traffic. Could use more lighting when it starts to get dark early.

Very hard to enter and exit the location depending on which way you're coming from, the islands in dividing the lanes are very inconvenient for people trying to turn into the parking lot. Light is busy. There are not really any parks or paths.

Two parking lot outlets to Martin Way. One is right turn only. The other allows for left turns, but moderate traffic can make that difficult. Additionally, turning right in hopes of getting to the freeway can be more difficult with moderate traffic.

Martin Way is very busy.

Thurston county is growing so it is getting busier, everything else is great.

Not many sidewalks, parks, or paths in the area.

No bike lane or side walks around really. Landscaping could be kept up better. No parks or paths, no housing nearby. Horrible left turn leaving and traffic conditions do not help.

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Bike access is difficult. Lighting is minimal   Landscaping is not kept up. Little to no parks or paths in the area.

Unprotected left hand turn makes leaving dangerous and coming in difficult. Traffic can get super busy because of the timing of traffic lights.

Only 1 way into business, very dangerous to come and go, east west is really bad for entering and exiting, north to south not so much. Biking is also dangerous. Need more parking spaces and a better layout of the parking lot. Lighting is horrible in the area, have had multiple people run into the telephone pole in the parking lot due to poor lighting conditions. Landscaping could use a lot of improvement. Traffic is very hectic between 12-6 which causes a lot of accidents in the surrounding area. No parks or paths around the area. Difficult to access business for people with disabilities, need this to be focused on. Housing nearby is “kind of sketchy.”

Businesses coming in across the street have been causing more traffic, kind of difficult to come in and out of business depending on which way you’re coming from.

Kind of difficult to access business from Martin Way depending on where you’re coming from. The left hand turn at the light is tedious to wait at, same for leaving the business. Parking problem that mainly pertains to landlord but more parking space would be nice. Traffic conditions can be pretty busy sometimes.

Left hand turn is dangerous. More lighting and landscaping work would be helpful Not many parks nearby so neutral.

Car access: said that with the three entrances they have it can be difficult to get into and out of their property. When it is very busy there can be a line in the parking lot of people trying to exit. Parking and layout: A lot of trucks with trailers will come in and take up five or so parking spots. It would be nice to have an area where those trailers can park specifically. Overhead: Don’t like how they do the water PUD.

There is no landscaping nor lighting along the stretch that my business is on Martin Way.

Zone 5

Traffic conditions make it difficult to leave the location safely sometimes.

Not easily accessible by bus. Not enough parking space and the parking lot is generally very full. Traffic conditions and the flow of traffic can be horrible in this area of Martin Way.

Traffic conditions on Martin make it difficult to enter and exit the location, especially because they are located right on the corner. No bus stops nearby. Limited amount of parking space that has an inconvenient layout. Traffic conditions are bad in the area.

Need more lighting and landscaping work.

People are speeding coming of the freeway which makes it difficult to come and go from the location.

Development going on right now makes access by walking difficult. Removed the bus stop that was across the street which cut down on their business from bus users. Traffic conditions can get a little busy at times but overall isn’t too bad. Almost no parks or paths nearby. Things like storm water are expensive.

The entrance to the businesses on Martin Way do not have a traffic light, but have one about 100 ft or less. This can create a lot of near accidents.

Question 4: Why did you originally locate your business on Martin Way?

Zone 1
He knew someone who owned the building

They wanted to share a space with a certain business

land was available

Not sure

Not sure

because of traffic flow

Not sure why original owner chose the location.

Traffic flow and access to I-5

I found the perfect building for my business after 10 months of looking.

Zone 2
best building option at the time

Allstate's coverage, passing auto traffic

needed more space

not sure

Probably for the decent amount of drive by traffic

Found a spot that he thought would work and counted cars which led him to see that there were a lot of people driving by on this street. Quite a few military members in the area as well, and thought it was a good street to be on. He could afford it at the time.

N/A

N/A

We moved from the corner of College and Pacific (current Happy Teriyaki location) in 1987 after acquiring and building out the property at 4426 Martin Way. The motivation was to own property. Didn't hurt to be located across the street from what was the largest movie theater in Thurston County. Mega church is fine, but I was not happy when the theater moved to lacey and I miss those Friday and Saturday movie crowds.

Location I am a dr.

Access to I-5, proximity to the Capitol to accommodate government travelers

Location

access to Chehalis trail, more spacious building

close to I-5 and hospital/healthcare businesses on Lilly Rd.

Zone 3
boss liked the visibility from the road and car access, easy access for walk in traffic

Being able to locate in the farm bureau building, size, building location, great moving from by Fred Myer gave them a break from the traffic

Historical - people know where to find us here
N/A

Zone 4
always been there

affordable and high traffic

relocated from martin way to another location on martin way

visibility in traffic

larger lot

premises became available

traffic, amount of people that drive by every day

found the property and new it would work for them

Corporate decision. Likely proximity to I-5 and local neighborhoods.

Access

Close to I-5

Customers in and out, good area
Quiet community at the time

not sure

wanted to be at this location in this community

because of a paperclip drop on a map
Better advertisement and traffic movement and less theft

new building, just leasing and had some good pricing. Good location and like the lacey location

Building was sold that they used to be in so they moved across the street

bigger shop

Location

already an established lumber yard and owners chose to purchase it
Visibility and available retail space.

Developing area

Took over a family business - no choice in location really

Zone 5
got his own practice

Used to be a vet location, not really sure though

location along martin way

Cost: Former landlord doubled our rent

Location and cost

25

Question 5: Why have you continued to locate your business along Martin Way?

Zone 1

low overhead costs outweigh the issues of the area, homelessness is bad Building is functional with offsite parking Nice that he works offsite because homeless people would drive customers away

convenient to stay at the same location

great location, access to i-5
Not sure

because of traffic flow

Their customers are familiar with their location and know where to find them. There is no where else to go.

Great retail location

Proximity to I5, appropriate building size.

Zone 2

has good visibility and location

passing auto traffic

needed more space

not sure

Same as above and owns his own business so he does not have to worry about payments on that.

N/A

N/A

We own the building and property and have for the past 34 years. Why stop now?

I have a lease.

Unable to move the building.

Location

access to Chehalis trail, more spacious building

cost, ease of location, same as question 4

Zone 3

visibility and great location on the corner

Building location, better traffic than other locations in lacey

N/A

Zone 4

affordable and high traffic

great visibility for customers coming by car

visibility in traffic

good size and accessibility for customers

Good location and not a lot of places to move to in Lacey that are good for car sales

moving at the end of this year to get a bigger space but has been a great location for traffic

seems to be working

Corporate decision. Likely proximity to I-5 and local neighborhoods.

Access

Close to I-5

Difficult to move a business

not sure

good traffic flow

because business is located there and customers know where to find it

Better advertisement and traffic movement and less theft

Like the location and been there for a long time, like their landlord. Also, when customers know where you're located and you've been there for a long time it makes it difficult to relocate

amount of visible traffic

Location

Zone 5

visibility from the road

Same as above, although good location among housing developments

location along martin way

Easy access & landmarks

Location and cost

26

Question 9: Respondents were asked to explain their selections from question 8.

Zone 1
This has kept him at his location despite the decline of the area due to the homeless population and lack of strategic planning by the cities of Lacey and Olympia

most customers and employees come by car

Most customers come by car, bartenders come by bus, and homeless problem needs to be dealt with

Most customers come by car and more parking space is needed for services

Most customers come in their personal vehicle

All employees drive

They are an auto shop so access by car and traffic conditions are very important. Also, want people to feel safe with more lighting. Landscaping is important so there isn't garbage and shopping carts everywhere.

Most important because it is the most frequently used. They need deliveries to be successful and the other options are not utilized as much as car/freight.

The ease, safety, and security for my drivers and customers.

I have customers and suppliers coming to us with regularity. It's near I5 and accommodates large trucks well.

Zone 2
Better landscaping would help make the area feel cleaner and most customers and employees come by car, so parking space is important

Good on amount of parking space but it is important to the success of the business, traffic conditions being better could improve access to location

More of a connection between housing and commercial businesses would be helpful (they seem distant and the business locations feel like a dead zone), most customers come by car, parking spaces are compact/very small for people driving larger vehicles

Sometimes customers are deterred from entering the Safeway because of the homeless issue in the parking lot, most customers come by car

Traffic conditions are really the only thing that hinder business and that only happens occasionally

It is important for employees and customers to feel safe at night

most customers and employees come by car

Important because he has a lot of parking area and finds himself lucky to have so much.

Safety is most important

Brings in the most customers and is the safest way to travel in the area.

We're still a family restaurant, and we're not within walking distance of many residences. People get to us via car.

It is dangerous getting into my parking lot. It is incredibly dangerous for bicycles. I worry about the safety of our patients coming and going. Many are elderly and are driving....

Olympia attracts state employees to it for business, but I believe it lacks amusement amenities to attract out-of-town visitors.

Martin way traffic can just me a nightmare at times.

We are a medical clinic and have clients with limited mobility

Zone 3
Lighting is very important for the safety of people working in the office, especially since many are women and a homeless encampment is being moved right behind the building Almost everyone comes by car

visibility from the road is important for bringing customers in, many come by car

Everything is working well but traffic can get fairly busy and it is important that customers are able to see the business by cutting back the trees and increased landscaping

Most customers access by car and they need to be able to enter and exit safely with the increasing business of traffic

Serve seniors and people with disabilities

Guest is looking for a convenient and safe parking / due to car break in and stealing

Almost everyone comes by car and it is working

Better traffic conditions, especially in the summer time when traffic backs up and makes it unsafe for people who are trying to make a left turn

Zone 4
ditches need to be controlled and landscaped better, more garbage cleanup Beautification Traffic can just get busy from time to time but it generally works well for the business

they want all traffic coming by car because they are a high end gift shop that wants to attract those customers/ businesses

Most customers come by car and traffic conditions dictate how easy it is to come and go

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most customers come by car so the parking lot and traffic conditions play a big role in the convenience of this transportation method

Visibility from the road is very important for attracting customers when people are in traffic driving by

Great location and layout for deliveries, they are also able to keep a lot of stock of their products on hand while allowing for their customers to easily navigate their parking lot

Most customers come by car, important to be able to access the location conveniently

Most customers come by car

For a car dealership, access by car is important

Traffic attracts customers, all come by car

Customers and employees come by car so it would be nice if traffic conditions could make it easy for them to enter and exit the location

Customers have a hard time getting to the location due to the odd layout of the medians/islands in the road and because the store is kind of hiding behind the gas station

We have a customer base ranging from close communities to commuters. Some use the bus, but most drive.

We have three delivery trucks, and receive freight often.

Need freight to sell.

Essentially everyone comes by car

Better traffic conditions could make it easier for customers to enter and exit by car

Most customers come by bus and car, good traffic flow helps with business

All employees and customers arrive by car

Most customers and employees access the business by car and the traffic conditions can make it easier/harder for them to enter

Access by car is important because a lot of customers use this method of transportation to come into their business, unsafe turns make this difficult along with traffic conditions on Martin Way, lighting causes problems for customers in the parking lot with parking, exiting, and getting approached by people

Most, if not all, customers come by car and the parking situation could be better

Mostly gets car traffic coming into business

access by car is most important because it is a great factor for business

N/A

Our business is local families and safety and traffic are the most important.

It is very weird to wait for two traffic signal to reach your destination

We work on vehicles - we are an automotive shop, access by car is 100% of our business.

Zone 5

customers come by car and need to enter/exit safely when traffic increases

Most customers come by car so it is important that the parking lot has enough space for them and that they are able to navigate the traffic conditions easily and safely

Most customers come by car and the traffic conditions make it difficult for them

most customers come by car so entering and exiting the premises easily is important. Lighting during winter hours is also important to make customers feel safe in the parking lot and entering the store

Most people come to the location by car and traffic conditions being better would help

Most everyone from customers to employees come by car

Most customers come by car or walking

As we service youth and adult martial arts for fitness and health (amongst other skills), having great and safe access off of Martin Way is important for continued access and safety.

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Question 10: What would you like to see added to Martin Way in the future?

Zone 1

Plan by Olympia and Lacey for making Martin Way a successful area, long-term strategy. Developing undeveloped area in a strategic, better way than just pot shops. Continuing to maintain it as a business location, not a residential location

more stop lights to help the flow of traffic

Taking care of the homelessness issue

Not sure

lighting and landscaping, aesthetically pleasing, and the ability to turn left/ leave left out of the business

Less homelessness

Lighting and police coverage for the homeless that "J" walk on Martin Way. And be Strict on this. It's for their safety.

Reduction of homeless encampments and vehicles. The beautification of the surrounding with landscaping, proper fencing, basic maintenance, etc.

Zone 2

Added clean up efforts of garbage on Martin Way

More lighting, flex the live work development, street side service industry improvement

Easier access onto freeway from Sleater Kinney

None

Better traffic updates

Solve the homelessness problem

Traffic circle if possible. Maybe it is too busy. Maybe more stoplights getting to the intersection of Lily and Martin

Security cameras

Better upkeep

more police patrols or social services to get homeless or drug dependent folks off the streets and out of parking lots, wooded areas etc.

Zone 3

not to add a homeless encampment

no more roundabouts

A light at the intersection of carpenter road and Britton parkway

Better bus stops and cross walks

More lighting or anything to keep the area clean and safe from homeless community

Shortening the slow lane so that its not 1/4 a mile long

Zone 4

vacant lots getting developed and improving the looks of the rough and unfinished locations around Martin Way, better restaurants, not just fast food

Stripes on the road that you can see, and reflective

street improvement, actual roadway, lots of claims from road conditions on martin way (they are an insurance company), clean up from glass and other debris in the roadway

light to turn left changing from only blinking yellow to a red/green

more traffic lights

Take out the islands blocking left hand turns

N/A

No response

Less traffic.

nothing

more sidewalks

nothing

Better lighting and traffic lights, dealing with the homelessness issue

Lighting, easier/safer exit and entry ways, a light that helps safely move traffic (ex: green left hand turn light instead of just the flashing yellow)

No roundabouts

Not sure

Nothing specific

N/A

N/A

Clean it up and make it safer.

No ideas now

Landscaping and lighting along Martin Way would be beneficial to the outside look of the area in general.

Zone 5

lots of stoplights, don't add more

dealing with congestion

figure out how to slow the traffic down a bit, speed limit is supposed to be 50 mph but people are going way faster

Marvin/Martin intersection can get very busy but doesn't impact the business too much

better crosswalks, better lighting

Better controlled light systems and better turn access

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Appendix 2

Martin Way Business Survey TRPC 2020

1. Please choose whether or not the following items are currently working well for your business or if they need improvement for your business to thrive.

	Working well for my business	Neutral	Needs Improvement
Access by car to business from Martin Way	☐	☐	☐
Access by car from business to Martin Way (eg left turn safety)	☐	☐	☐
Access by bicycle	☐	☐	☐
Access by pedestrians (sidewalks, walkways	☐	☐	☐
Access by bus	☐	☐	☐
Amount of parking space	☐	☐	☐
location or layout of parking spaces	☐	☐	☐
Lighting	☐	☐	☐
Landscaping	☐	☐	☐
Traffic Conditions on Martin Way	☐	☐	☐
Amenities such as parks or paths	☐	☐	☐
Access for persons with disabilities	☐	☐	☐
Housing nearby	☐	☐	☐
Overhead costs	☐	☐	☐

If needs improvement, ask for clarity and record answers here.

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2. Approximately how many full-time employees work at your business?

3. How long have you been at your current location?

4. Why did you originally locate your business on Martin Way? (cost, access to i-5)

5. Why have you continued to locate your business along Martin Way? (cost, access to i-5)

6. From the perspective of retaining a quality workforce, how important are the following?

	Not important	Neutral	Important
Convenient bus service	☐	☐	☐
Easy car access	☐	☐	☐
Easily accessible by bicycle	☐	☐	☐
Walkable with good pedestrian pathways	☐	☐	☐

7. From the perspective of your regular customers, how important are the following?

	Not important	Neutral	Important
Convenient bus service	☐	☐	☐
Easy car access	☐	☐	☐
Easily accessible by bicycle	☐	☐	☐
Walkable with good pedestrian pathways	☐	☐	☐

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8. Which of the following are the most important to the success of your business? (Select 3 max)

- ☐ Access by car
- ☐ Access for freight/deliveries
- ☐ Access by bicycle
- ☐ Access by pedestrians
- ☐ Access by transit (bus)
- ☐ Amount of parking space
- ☐ Location/layout of parking space
- ☐ Other (please specify)
- ☐ Lighting
- ☐ Landscaping
- ☐ Traffic conditions along Martin Way
- ☐ Amenities (ex., parks, paths)
- ☐ Access for persons with disabilities
- ☐ Low overhead costs
- ☐ Housing nearby

9. Please explain why your choice from the previous question is the most important for your business?

10. Approximately what percentage of your workforce is now working from home due to Covid-19?

11. What would you like to see added to Martin Way in the future?

12. Would you like someone to follow-up with you about COVID-19 resources for businesses?

- ◯ Yes
- ◯ No

13. Enter the Business ID from Worksheet

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Appendix 3 Visual Preference Survey

Martin Way Corridor Study

Visual Preference Survey Results

Date August 3, 2021
To Katrina Van Every, TRPC
From Rachel Miller, MAKERS
CC Sam Brookham, Leland Consulting Group

This memo serves as a summary of the land use and transportation results from the recently conducted Visual Preference Survey for the Martin Way Corridor Study.

Land Use

- Overall there is strong support for retail services and public amenities along the corridor, and mixed support for residential and office uses.
  - As Martin Way continues to develop, what types of buildings and development would you like to see more of?
    - 81% Public amenities
    - 74% Retail, services, restaurants, etc
    - 43% Offices
    - 42% Housing
    - 19% Regional light-industrial and general commercial
  - Lower density housing types are more strongly supported than higher density types. Support ("very good idea" and "appropriate"):
    - 63% Townhouses
    - 57% 2-3 story apartments
    - 37% 4-6 story apartments
    - 25% 5-7 story apartments
- Roughly half of all respondents (49%) think there are large commercial spaces along Martin Way that could be adapted and re-used.
  - When asked about specific opportunities, the former ShopKo building was the most frequently mentioned, along with other buildings in "Martin Village" (Regal Cinema shopping center near I-5).
  - Respondents also mentioned many vacancies and run-down buildings in strip malls along the arterial.
- Respondents felt small and medium retail uses (and, to a lesser extent, offices) were appropriate to site directly adjacent to the sidewalk on Martin Way, while other uses should be separated from the road by open space or, for large commercial stores, parking lots.
- **Demographics**
  - Support for housing varied the most among different demographic groups.
  - In general, low income respondents, younger respondents, respondents of color, and renters tended to be more supportive of housing, with lower support for commercial uses.
  - Younger residents had the highest tolerance for larger apartments (4-6 stories and 5-7 stories) of any group but still preferred lower densities overall.

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  - All groups ranked public amenities as the most desirable type of new development. Low-income respondents had the highest support for public amenities among any group, while older respondents had the lowest support.
  - About 25% of respondents didn't fill out the race and income questions. These respondents tended to be significantly more negative about all proposals than the group as an average.

Signs

- Of the five types of signs tested, monument signs were by far the most popular among all groups, followed by pole signs.
- Billboards had the least support. 32% of respondents said billboards were not appropriate on Martin Way. However, 31% said they were either appropriate or a "very good idea".
- Respondents generally did not find temporary signs to be helpful:
  - Two thirds said temporary signs were "not helpful" or "somewhat helpful".
  - Only 6% said temporary signs were very helpful.
- There were no significant differences among the responses of different demographic groups.

Transportation

- Generally strong support for changes to roadway to support pedestrian safety
- Filling sidewalk gaps priority—In front of existing businesses is the clear favorite
- Crosswalks
  - Flashing beacon is favorite and very strongly supported (75% support)
  - Other options also popular
- Bicycle infrastructure
  - Protected lane (physical barrier) is most popular (72% support and large group of "very good idea" with 49.5%)
  - Other options also popular
  - Painted lanes are least popular
- Landscape treatments
  - Street trees between road and sidewalk most popular (81% support and large group of "very good idea" with 49%)
  - Some support for stormwater swale and landscaped strip
- Median—Landscaped median much more popular than hardscape median
  - **Most popular** roadway intervention on survey (83% support and largest group of "very good idea" with 58%)
  - Even stronger support among low income and people of color
- Utilities undergrounding
  - Overall, more support than opposition, though responses are very divided
  - 56% Very important/Important
  - 39% Somewhat important/Not important
  - **Least supported** roadway improvement on survey
- **Demographics**
  - **Very limited differentiation among demographic groups overall**
  - Low income
    - Low-income respondents were most "positive" group, with high rates of approval towards most interventions

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    - Most supported idea: landscaped median (88%)
    - Even stronger support for protected bike lanes (and buffered bike lanes)
    - Smallest sample size among demographic groups
    - Stronger support for sidewalks along major streets
- People of Color
    - Limited differentiation from group as a whole
    - Most supported idea: street trees (83%)
    - Stronger support for pedestrian bridge and utility undergrounding
    - Somewhat stronger support for shared use path (though protected bike lanes is still the favorite) and narrow landscape strip (though still prefer street trees)
- Residents within ¼ mile
    - Generally less supportive of proposed interventions
    - Residents within ¼ mile somewhat lower reported incomes and more likely to be renters
- Gender
    - Little differentiation based on gender
    - Females generally as or more supportive of all interventions except they showed less support for undergrounding utility lines and slightly less for shared use paths
- Age
    - Younger respondents generally more supportive of interventions than older respondents
- Tenure
    - Homeowners generally less supportive of interventions than renters

connecting communities

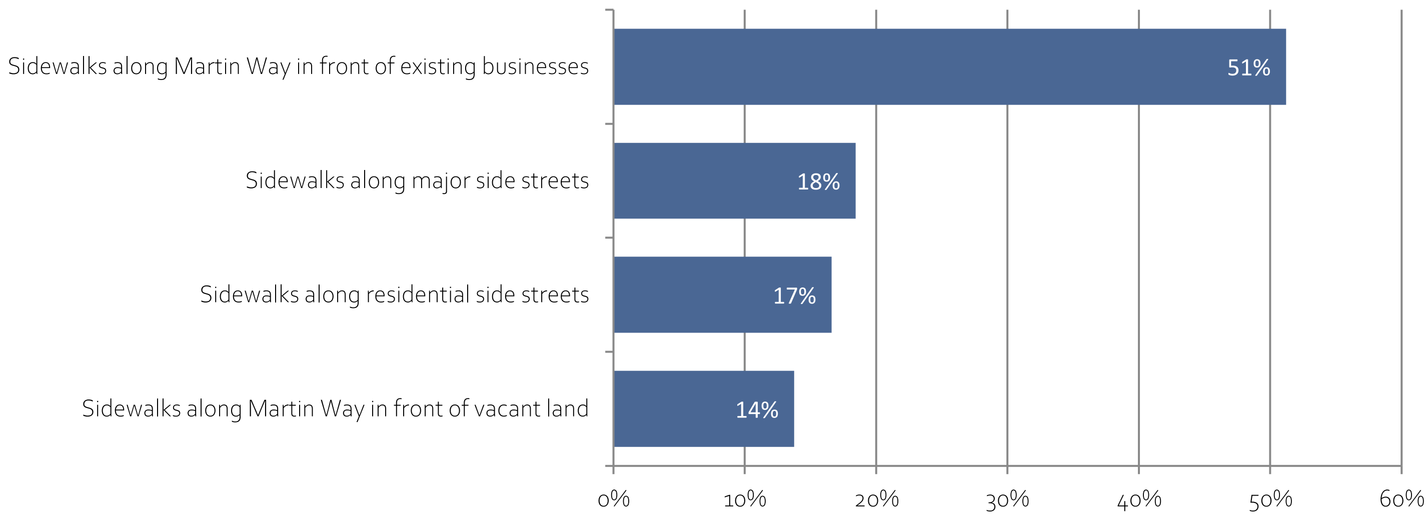
MARTIN WAY CORRIDOR

Online Open House
Visual Preference Survey

895 Total Responses

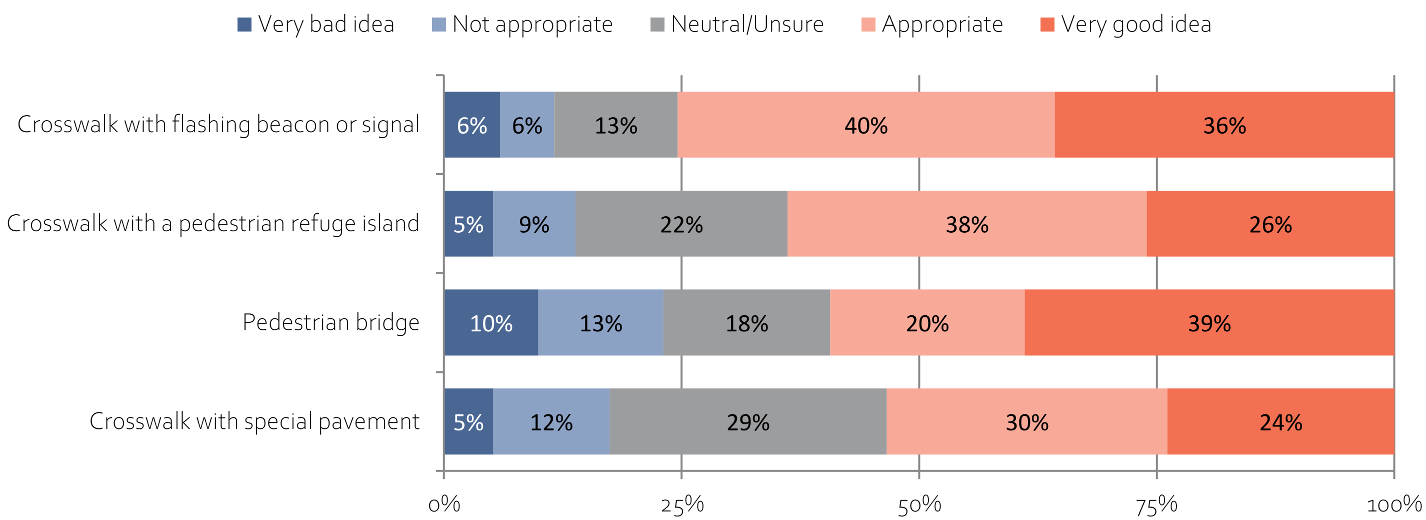
Sidewalk gaps exist along Martin Way and its side streets. What sidewalk gaps are most important to fill first?

Answered: 873 Skipped: 22



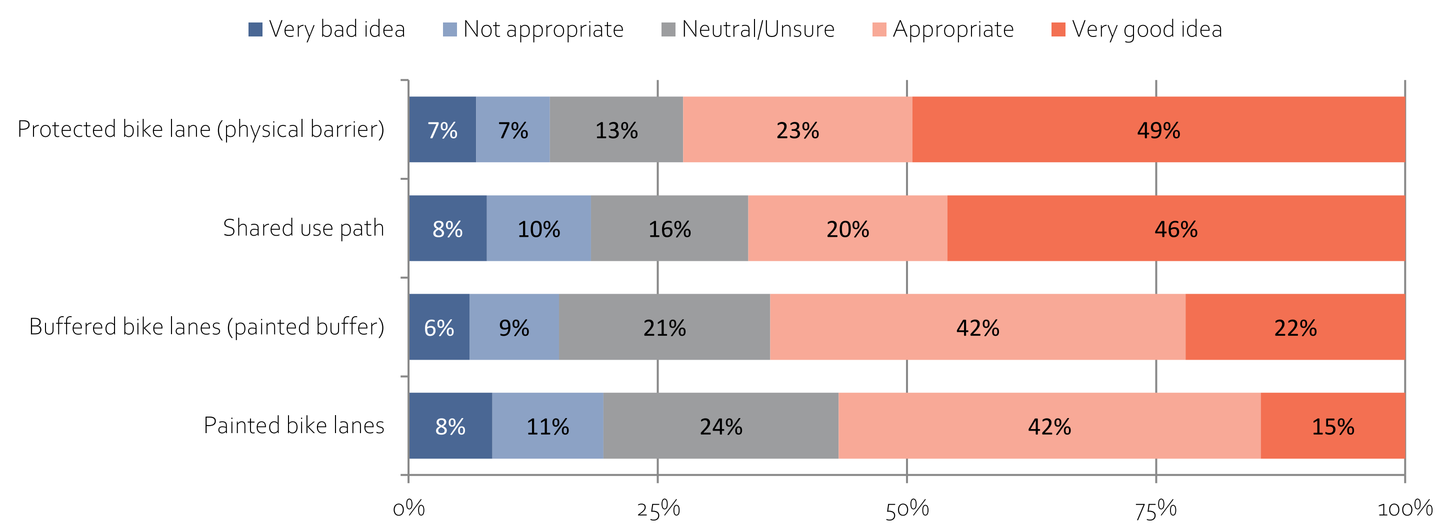
As a pedestrian or someone who uses a mobility device (wheelchair, walker, etc.), what kind of crossings would you like to see on Martin Way (see images above)?

Answered: 884 Skipped: 11



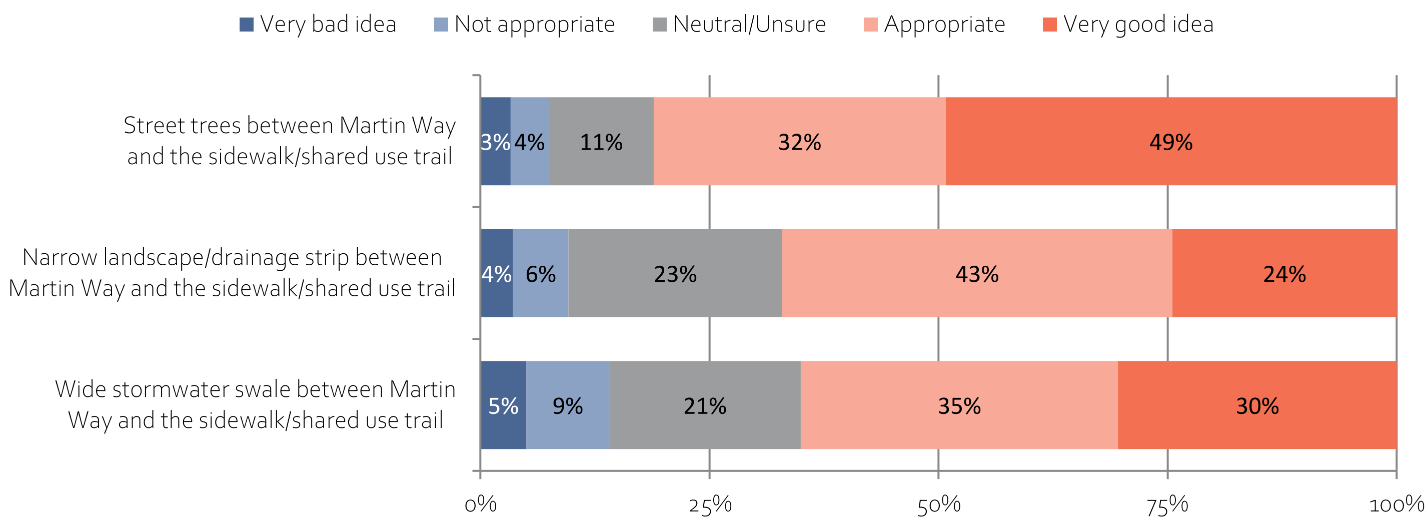
As a bicyclist, what kind of bike lanes would you like to see on Martin Way?

Answered: 864 Skipped: 31



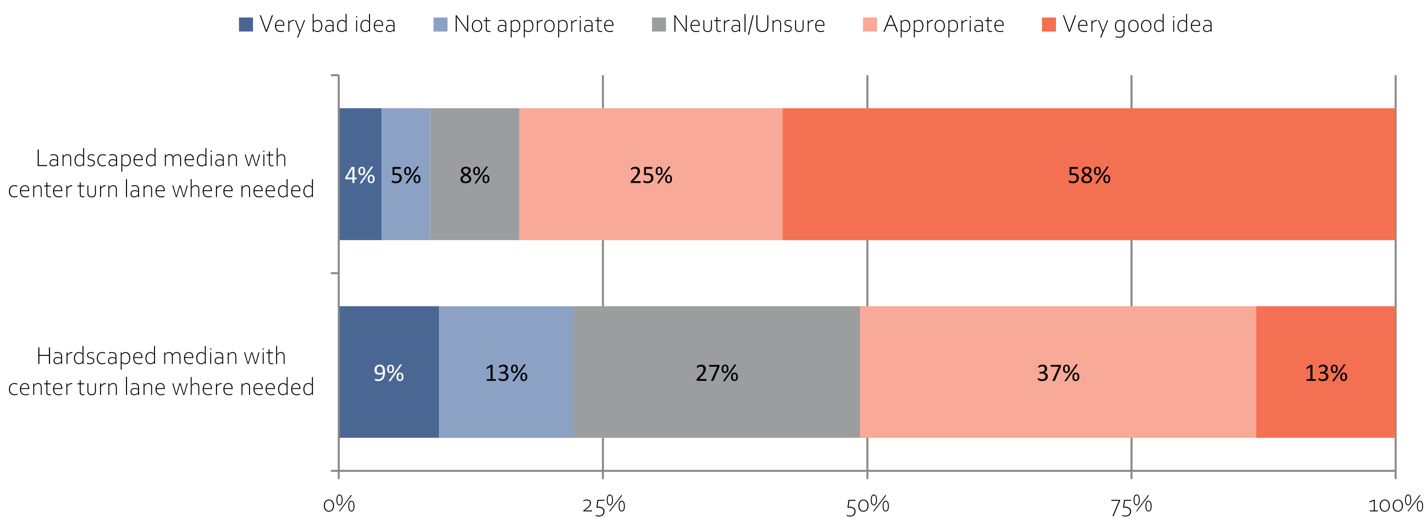
What type of landscape treatments would most improve Martin Way?

Answered: 857 Skipped: 38



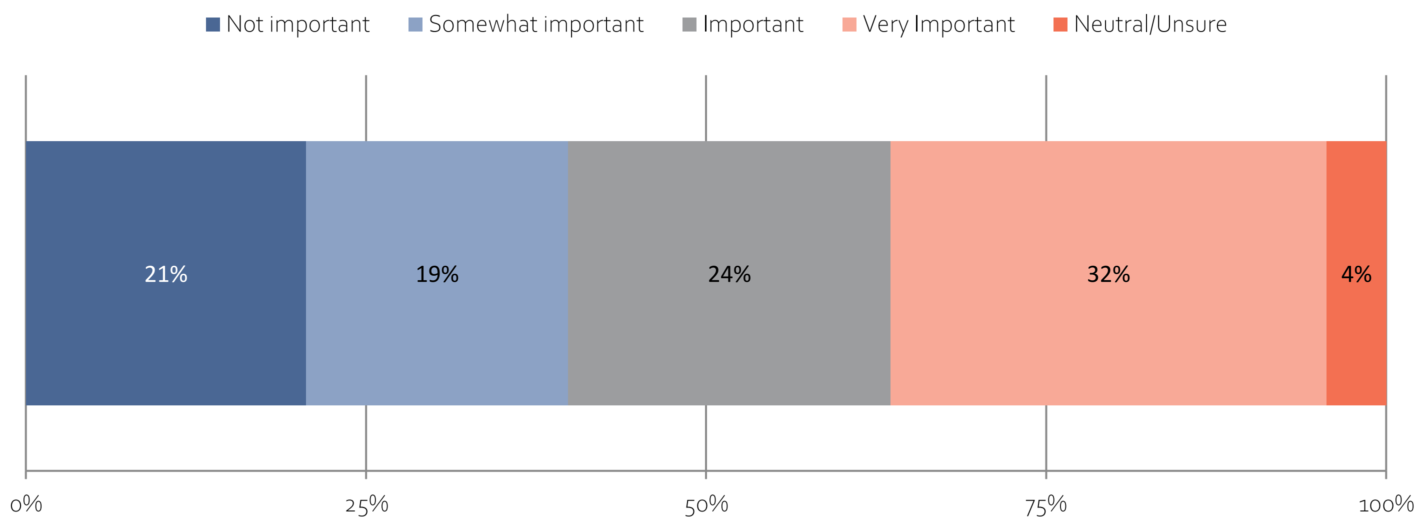
What type of median would you most like to see on Martin Way?

Answered: 851   Skipped: 44



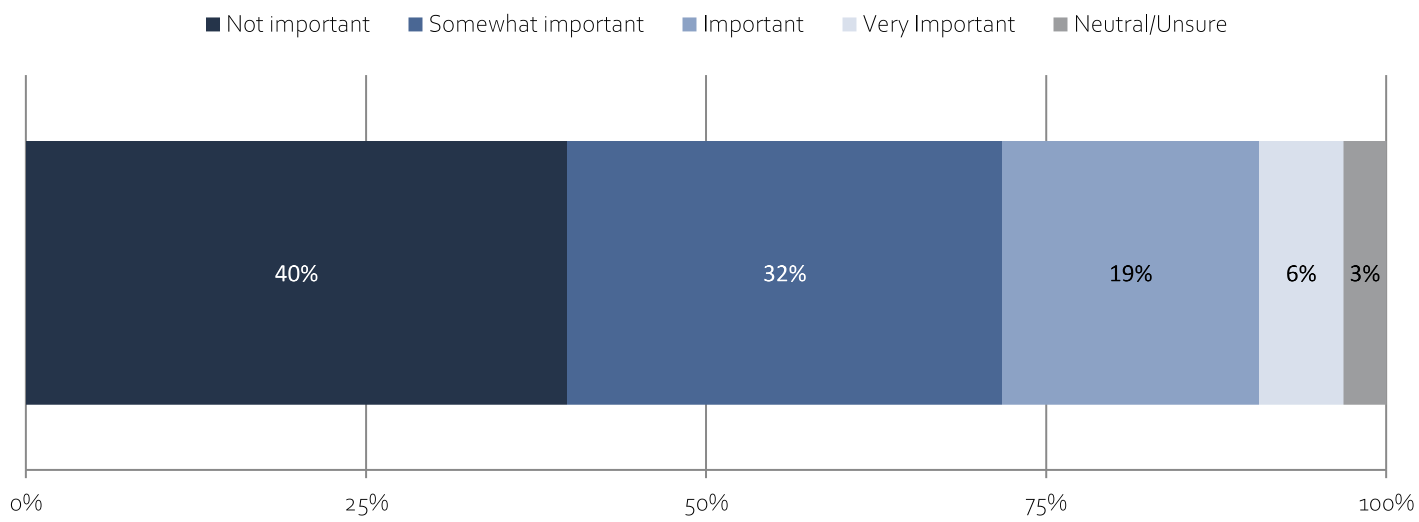
Knowing it can be expensive, how important is it to you that existing overhead utility lines along Martin Way be rerouted underground?

Answered: 845 Skipped: 50



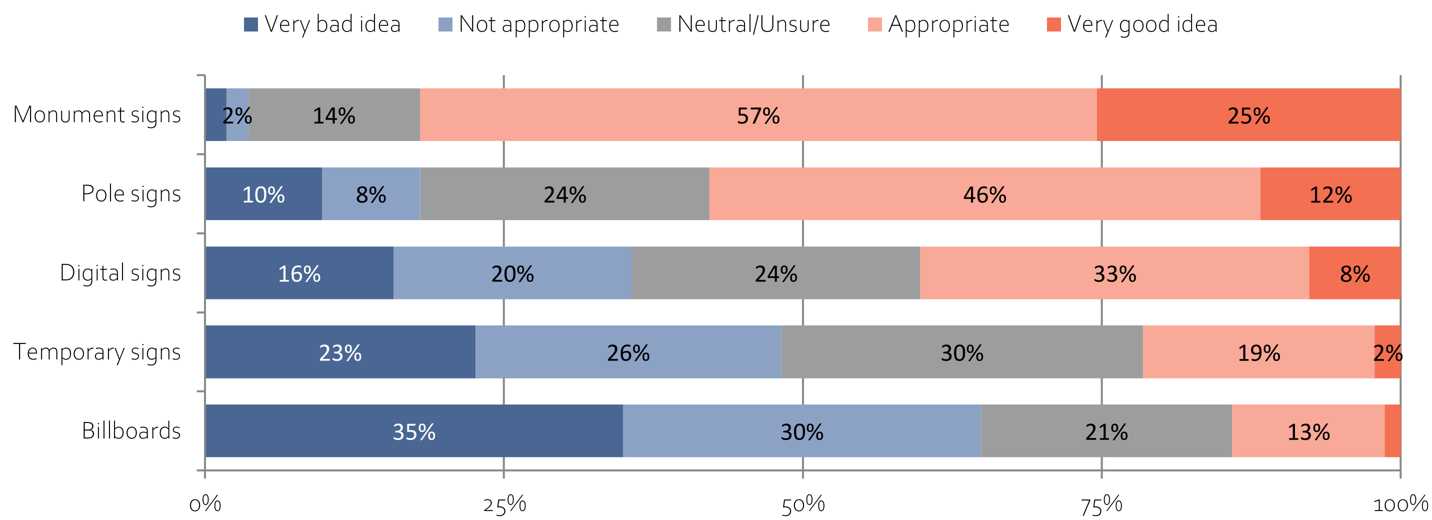
To what extent do temporary signs help you find the places - or the products - you're looking for along Martin Way?

Answered: 822 Skipped: 73



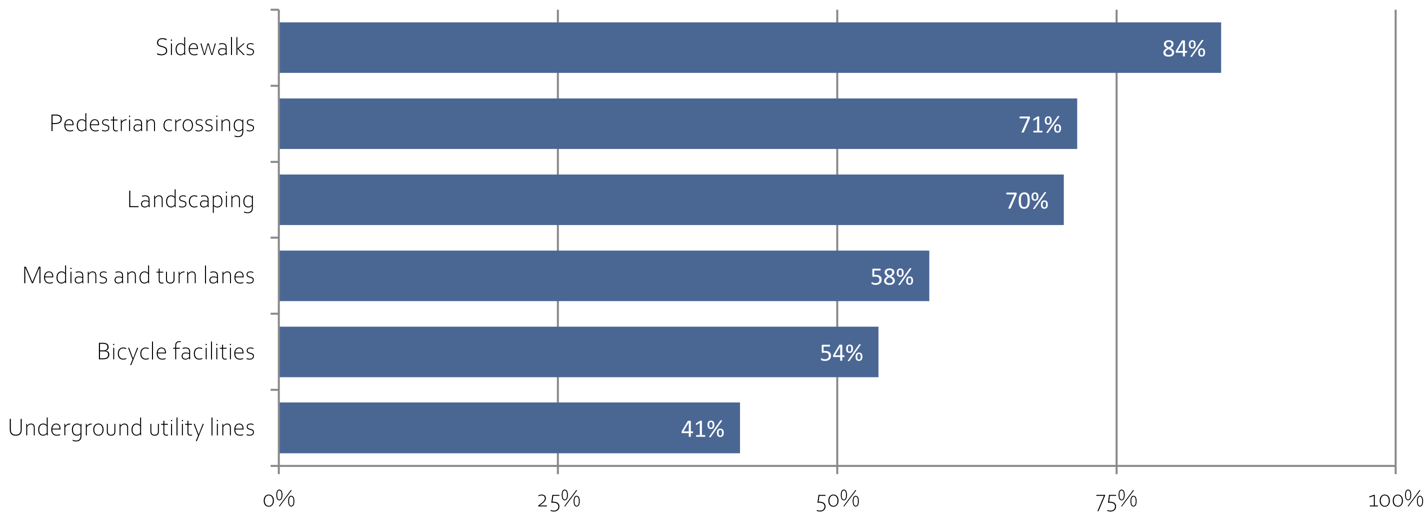
Which sign types are appropriate along Martin Way?

Answered: 844 Skipped: 51



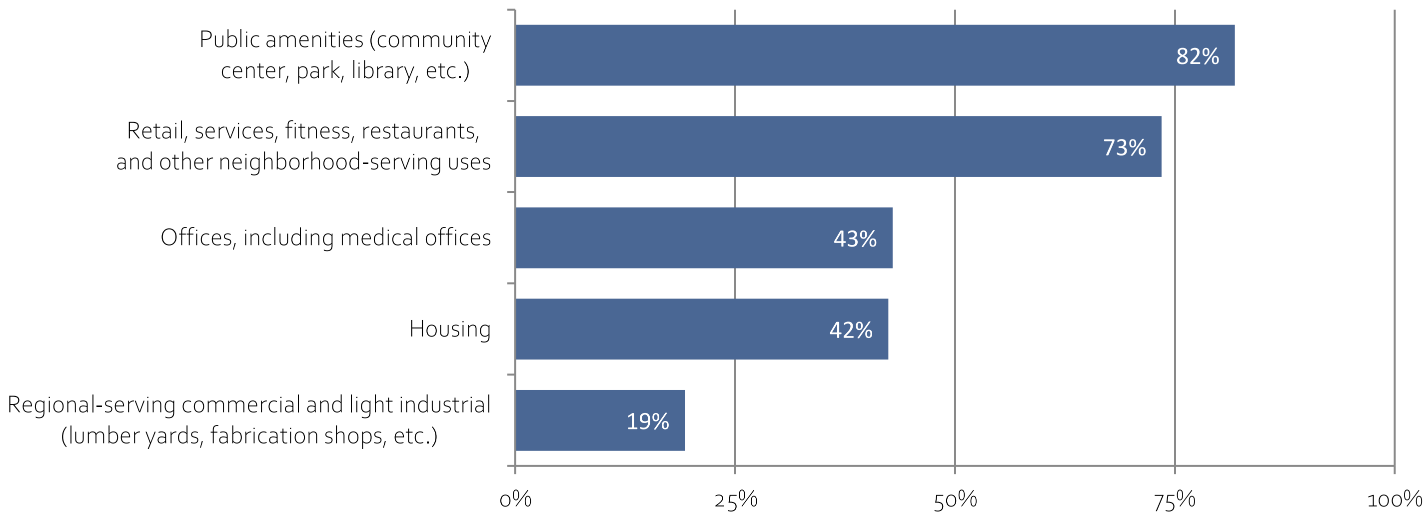
As Martin Way continues to develop, what types of streetscape elements would you like to see more of? (check all that apply)

Answered: 838 Skipped: 57



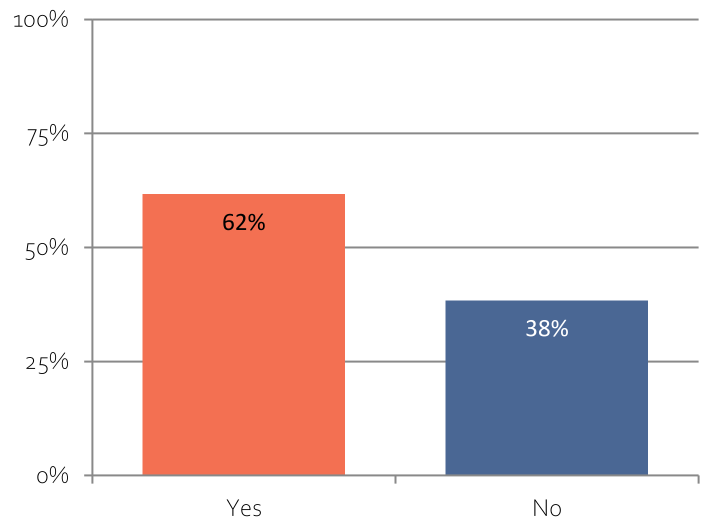
As Martin Way continues to develop, what types of buildings and development would you like to see more of? (check all that apply)

Answered: 830 Skipped: 65



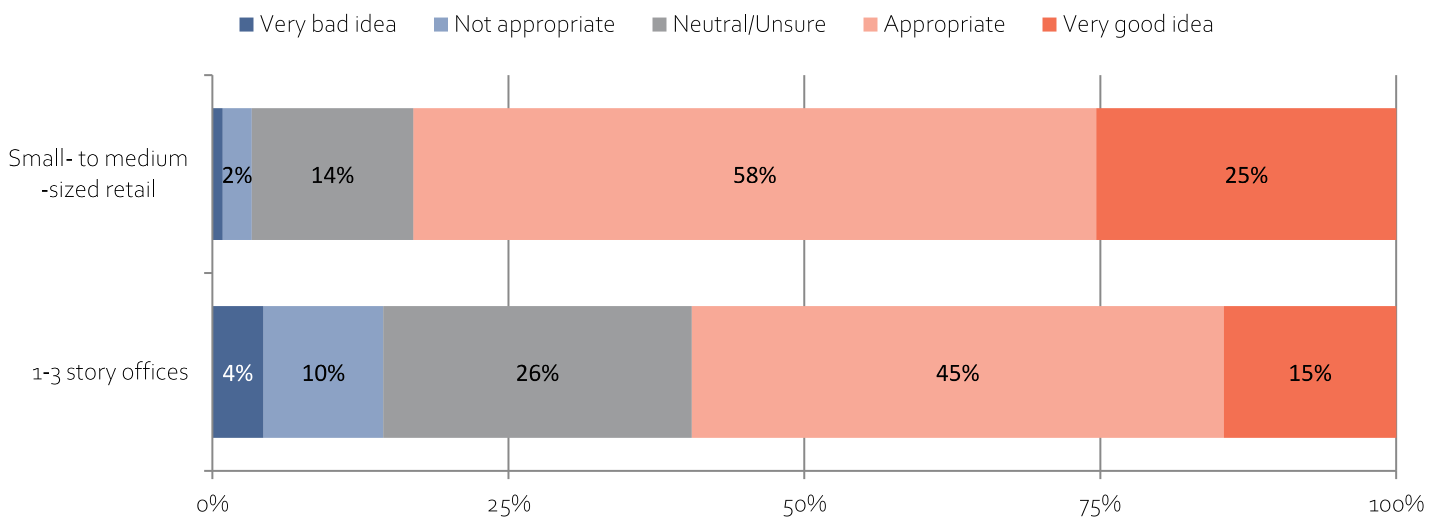
Are there large commercial spaces along Martin Way you think could be adapted and re-used? Where are there opportunities to adapt and re-use large commercial spaces?

Answered: 710 Skipped: 185



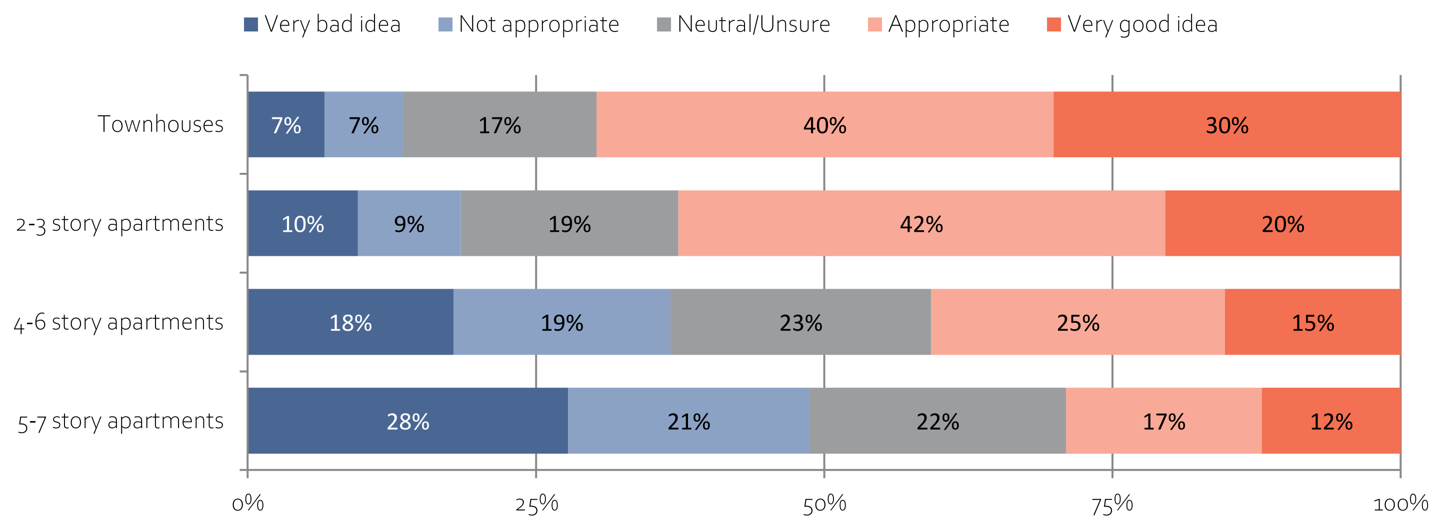
As the Martin Way corridor continues to develop, what kind of commercial space do you want to see more of?

Answered: 822 Skipped: 73



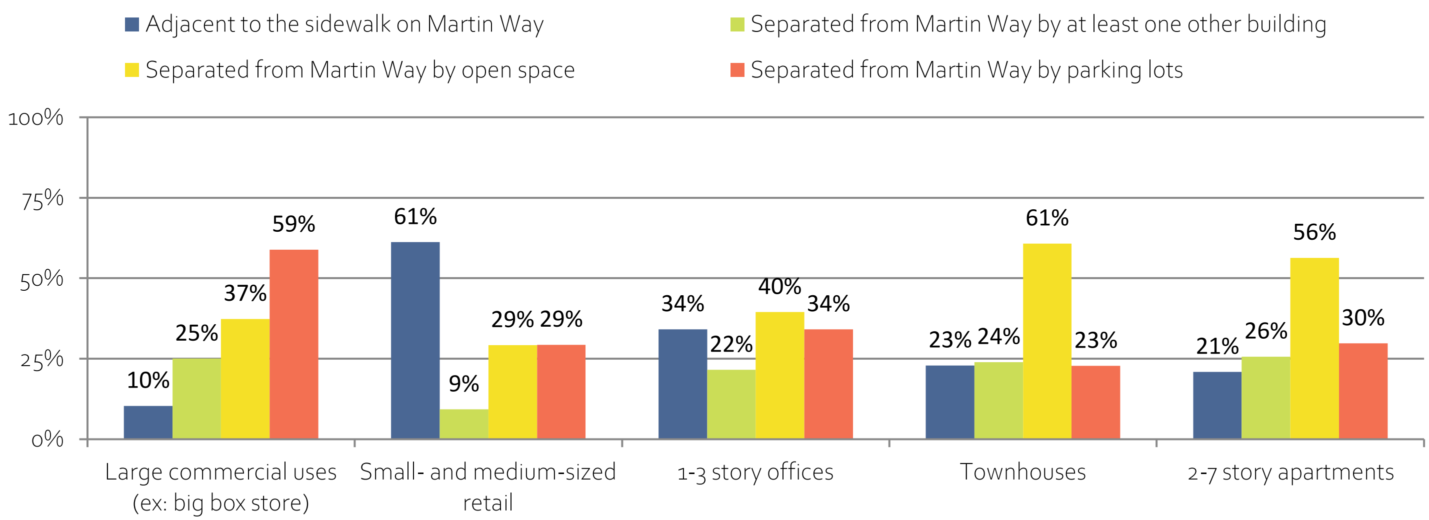
As the Martin Way corridor continues to develop, how appropriate do you feel the following developments are?

Answered: 819 Skipped: 76



How should the following development types be oriented to Martin Way? (check all that apply)

Answered: 791 Skipped: 104



Survey Demographics

Race/Ethnicity*...
3% American Indian & Alaska Native
5% Asian
2% Black or African American
4% Hispanic or Latino
1% Native Hawaiian & Pacific Islander
92% White
2% Some other race
**Respondents could choose more than one answer*

Live...
21% are corridor residents
79% live elsewhere

Tenure...
18% are renters
82% are homeowners
<1% are unhoused or couch surf

Household Income...
2% earned less than $24,999
10% earned $25,000 to $49,999
88% earned $50,000 or more

Age...
1% 24 or younger
26% 25-39
34% 40-54
31% 55-69
8% 70 or older

Gender...
63% female
35% male
2% Non-binary

connecting communities

MARTIN WAY CORRIDOR

Questions about the survey results? Contact:

Katrina Van Every, Senior Planner
vaneveryk@trpc.org

www.trpc.org/martinway

Visual Preference Survey

Martin Way Visual Preference Survey

Help us understand what you think Martin Way should look like as we plan for the next 25 years. We'll ask you about your thoughts on:

-Streetscape elements – sidewalks, bicycle facilities, landscaping, utilities, and signage
-Building Types – commercial renovations, new retail, offices, and residential

This survey will take about 10 minutes to complete. Thank you for your time and feedback!

1

Visual Preference Survey

Sidewalks & Pedestrian Crossings

Sidewalks coupled with safe and frequent crossings support a walkable urban environment, making it easier to get from place to place. Clearly defined sidewalks and crossings where pedestrians are expected to be help make the road safer for both walkers and drivers.

Sidewalks

1. Sidewalk gaps exist along Martin Way and its side streets. What sidewalk gaps are most important to fill first?

- ◯ Sidewalks along Martin Way in front of existing businesses
- ◯ Sidewalks along Martin Way in front of vacant land
- ◯ Sidewalks along major side streets
- ◯ Sidewalks along residential side streets

Pedestrian Crossings

A. Crosswalk with flashing beacon or signal

2

3

B. Crosswalk with a pedestrian refuge island

C. Crosswalk with special pavement

D. Pedestrian bridge

2. As a pedestrian or someone who uses a mobility device (wheelchair, walker, etc.), what kind of crossings would you like to see on Martin Way (see images above)?

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
A. Crosswalk with flashing beacon or signal					
B. Crosswalk with a pedestrian refuge island					
C. Crosswalk with special pavement					
D. Pedestrian bridge					

4

Visual Preference Survey
Bicycle Facilities

More people bicycle when they have safe places to ride. Routes that provide comfortable, low-stress bicycling conditions can increase safety for people walking and driving as well as bicyclists.

A. Painted bike lanes

B. Buffered bike lanes (painted buffer)

C. Protected bike lanes (physical barrier)

5

D. Shared use path

3. As a bicyclist, what kind of bike lanes would you like to see on Martin Way (see images above)?

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
A. Painted bike lanes	○	○	○	○	○
B. Buffered bike lanes (painted buffer)	○	○	○	○	○
C. Protected bike lane (physical barrier)	○	○	○	○	○
D. Shared use path	○	○	○	○	○

6

Visual Preference Survey

Landscaping

Trees and landscaping along roadways enhance urban streets by creating shade and reducing stress. Landscaping can also slow, absorb, and clean stormwater runoff so that less pollution makes its way into streams and groundwater. When requiring or putting in landscaping, communities need to consider the cost of long-term maintenance and avoid creating safety hazards.

A. Street trees between Martin Way and the sidewalk/shared use trail

B. Wide stormwater swale between Martin Way and the sidewalk/shared use trail

7

C. Narrow landscape/drainage strip between Martin Way and the sidewalk/shared use trail

4. What type of landscape treatments would most improve Martin Way? (see images above)

	Very bad idea	Not appropriate	Neutral/unsure	Appropriate	Very good idea
A. Street trees between Martin Way and the sidewalk/shared use trail	○	○	○	○	○
B. Wide stormwater swale between Martin Way and the sidewalk/shared use trail	○	○	○	○	○
C. Narrow landscape/drainage strip between Martin Way and the sidewalk/shared use trail	○	○	○	○	○

8

Visual Preference Survey

Medians & Turn Lanes

Center medians can help calm traffic, act as a refuge for pedestrians crossing wide streets, and make room for landscaping or lighting. When combined with center turn lanes, they limit access points in ways that can help reduce collisions by making traffic patterns more predictable.

A. Landscaped median with center turn lane where needed

B. Hardscaped median with center turn lane where needed

5. What type of median would you most like to see on Martin Way? (see images above)

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
A. Landscaped median with center turn lane where needed	○	○	○	○	○
B. Hardscaped median with center turn lane where needed	○	○	○	○	○

9

Visual Preference Survey

Overhead Utility Lines

Putting utility lines underground can improve the way a street looks and service reliability. The tradeoff is burying utility lines can be very costly and can make repairs more challenging. Burying utility lines can be timed with other construction projects to reduce costs.

Above vs. Below Ground Utility Lines

6. Knowing it can be expensive, how important is it to you that existing overhead utility lines along Martin Way be rerouted underground?

Not important	Somewhat important	Important	Very Important	Neutral/Unsure
○	○	○	○	○

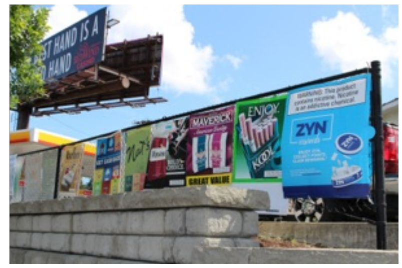
10

Visual Preference Survey

Signage

Signs help people find the places and products they're looking for. They can also make the street look cluttered and uninviting.

Temporary Signs



7. To what extent do temporary signs help you find the places - or the products - you're looking for along Martin Way? (see image above)

Not helpful	Somewhat helpful	Helpful	Very helpful	Neutral/Unsure
○	○	○	○	○

Sign Types

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8. Which sign types are appropriate along Martin Way? (see images above)

	Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very Good Idea
A. Temporary signs					
B. Monument signs					
C. Digital signs					
D. Billboards					
E. Pole signs					

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Visual Preference Survey
Development Generally

9. As Martin Way continues to develop, what types of streetscape elements would you like to see more of? (check all that apply)

- ☐ Sidewalks
- ☐ Pedestrian crossings
- ☐ Bicycle facilities
- ☐ Landscaping
- ☐ Medians and turn lanes
- ☐ Underground utility lines

10. As Martin Way continues to develop, what types of buildings and development would you like to see more of? (check all that apply)

- ☐ Housing
- ☐ Offices, including medical offices
- ☐ Retail, services, fitness, restaurants, and other neighborhood-serving uses
- ☐ Regional-serving commercial and light industrial (lumber yards, fabrication shops, etc.)
- ☐ Public amenities (community center, park, library, etc.)

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Visual Preference Survey
Commercial Buildings

Big Box Commercial Renovations

Older commercial buildings over 80,000 square feet ("big box" stores, for example) on large lots can be converted to new uses and make use of existing parking lots. This can be helpful in reviving vacant or struggling retail areas and offer destinations for nearby residents and workers.

Below are examples of big box commercial renovations:

Kmart to school conversion

Grocery store to library conversion

Kmart to museum conversion

Grocery store to church conversion

11. Are there large commercial spaces along Martin Way you think could be adapted and re-used?

- Yes
- No

12. If you answered "yes" to the previous question, where are there opportunities to adapt and re-use large commercial spaces?

14

New Retail and Office Space

Below are examples of retail and office buildings that are common on the Martin Way corridor:

A. Small- and medium-sized retail

B. 1-3 story offices

13. As the Martin Way corridor continues to develop, what kind of commercial space do you want to see more of? (see images above)

	Very bad idea	Not appropriate	Neutral/unsure	Appropriate	Very good idea
A. Small- to medium-sized retail	○	○	○	○	○
B. 1-3 story offices	○	○	○	○	○

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Visual Preference Survey

Residential Buildings

Below are types of residential development that are possible on the Martin Way corridor:

Townhouses



Some quick facts about townhouse developments:
-15-30 dwelling units per acre
-An affordable homeownership option
-Supports some small businesses within a short walk
-Supports frequent transit service within a short walk

14. As the Martin Way corridor continues to develop, how appropriate do you feel townhouse developments are?

Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
○	○	○	○	○

2-3 Story Apartments




16

Some quick facts about 2-3 story apartments:
-Already common along Martin Way
-20-30 dwelling units per acre
-Surface parking
-Supports small businesses within a short walk
-Supports frequent transit service within a short walk

15. As the Martin Way corridor continues to develop, how appropriate do you feel 2-3 story apartment developments are?

Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
○	○	○	○	○

4-6 Story Apartments

Some quick facts about 4-6 story apartments:
-Becoming more common along Martin Way
-40-60 dwelling units per acre
-Surface parking
-Supports small businesses within a short walk
-Supports frequent transit service within a short walk

16. As the Martin Way corridor continues to develop, how appropriate do you feel 4-6 story apartment developments are?

Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
○	○	○	○	○

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5-7 Story Apartments

   

Some quick facts about 5-7 story apartments:
-No developments along Martin Way currently
-50-120+ dwelling units per acre
-Structured parking is costly; typical only when parking is limited
-Supports small businesses within a short walk
-Supports frequent transit service within a short walk

17. As the Martin Way corridor continues to develop, how appropriate do you feel 5-7 story apartment developments are?

Very bad idea	Not appropriate	Neutral/Unsure	Appropriate	Very good idea
○	○	○	○	○

18

Visual Preference Survey

Building Orientation

We'd like to understand how you think various development types should be situated in relationship to Martin Way. Building fronts, especially entries, can be lively places that make a sidewalk or street more inviting for people.

18. How should the following development types be oriented to Martin Way? (check all that apply)

	Adjacent to the sidewalk on Martin Way	Separated from Martin Way by at least one other building	Separated from Martin Way by open space	Separated from Martin Way by parking lots
Large commercial uses (ex: big box store)				
Small- and medium-sized retail				
1-3 story offices				
Townhouses				
2-7 story apartments				

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Visual Preference Survey

Demographic Information

Please share some information about yourself. Since we want to make sure we hear from people from all walks of life and all parts of the community, this will help use determine if we have reached a broad representation of the community. These questions are optional.

19. If you would like to be informed via email about this project, please provide your email address.

20. What is your age range?

- ◯ 14 or younger
- ◯ 15-24
- ◯ 25-39
- ◯ 40-54
- ◯ 55-69
- ◯ 70-84
- ◯ 85 or older
- ◯ Prefer not to answer

21. What is your gender?

- ◯ Female
- ◯ Male
- ◯ Non-binary
- ◯ Prefer not to answer

20

22. Do you live within a ¼ mile of Martin Way?

- Yes
- No
- I don't know
- Prefer not to answer

23. Does your household rent or own your home?

- My household rents our home
- My household owns our home
- My household lives with someone else (ex: couch surfing)
- My household is unhoused or unsheltered
- Prefer not to answer

24. What is your race/ethnicity? (check all that apply)

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic or Latino
- Native Hawaiian or Other Pacific Islander
- White
- Some other race
- Prefer not to answer

21

25. What is your annual household income?

- $14,999 or less
- $15,000-$24,999
- $25,000 - $34,999
- $35,000 - $49,999
- $50,000 - $74,999
- $75,000 - $99,999
- $100,000 or more
- I don’t know
- Prefer not to answer

Appendix 4 Market Study

Martin Way Corridor

Market Study FINAL

PREPARED FOR

THURSTON REGIONAL PLANNING COUNCIL

PREPARED BY

LELAND CONSULTING GROUP

JULY 2021

Introduction

Purpose & Methodology

Martin Way Corridor Study. Martin Way is a major regional thoroughfare and corridor serving the communities of Olympia, Lacey, and Thurston County. The former state highway serves as the area's primary alternative to Interstate 5, has frequent transit service, and is home to a variety of business activities and destinations. Looking forward, the corridor is forecasted to grow in importance into the future as a strategic transportation link and business destination. A comprehensive review of the Martin Way's current conditions and future opportunities is underway to help guide growth to better serve the needs of the community.

Led by Thurston Regional Planning Council, the Martin Way Corridor Study will identify a common vision, as well as opportunities to develop the identity and character of the Martin Way Corridor (MWC) as it grows into the future.

Market Study. The purpose of this market study is to identify economic opportunities and constraints, highlight potential models for future development, establish the potential corridor market capture for residential, commercial, industrial, and other uses, and begin a discussion of strategic recommendations. It will specifically address the following questions:

- What are the current demographics and employment trends that affect opportunities in the corridor, including the ongoing COVID pandemic and vehicle and transit access and ridership?
- What are the market, economic, and employment factors that affect development opportunities?
- What are the best opportunities for redevelopment?
- Which land uses, character, and scale are most appropriate and are supported by economic conditions?

While the market study will be conducted for the entire corridor, the latter recommendations will focus on high-priority areas based on market conditions, land availability, and regulatory structure.

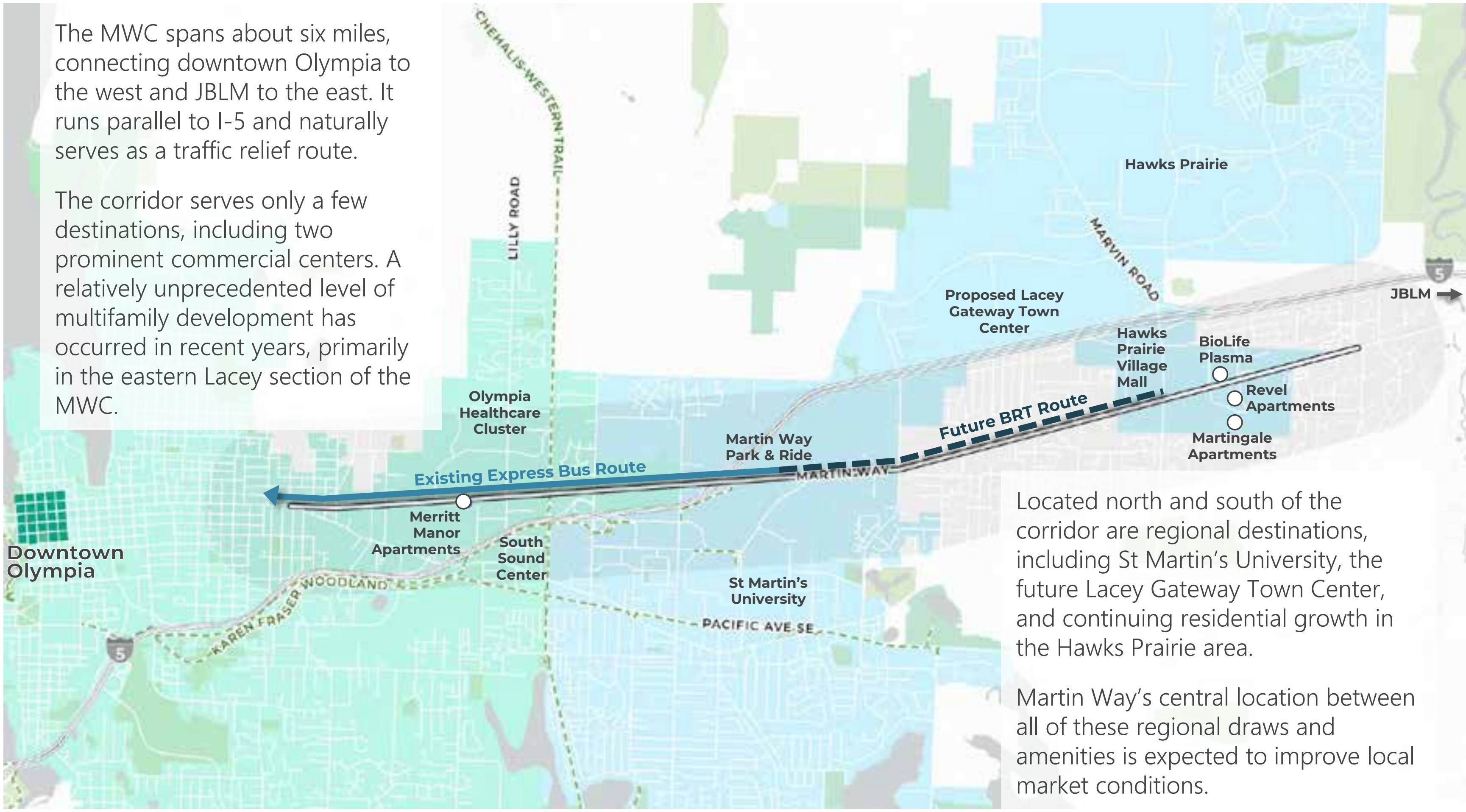
Methodology. In order to document opportunities and constraints from a market perspective, Leland Consulting Group documented key takeaways from existing planning documents, market studies, and broker reports; analyzed US census data, real estate data (from Costar, a national database), building permit data, and economic information; and held stakeholder interviews with developers, brokers, major employers, and public agency partners.

Introduction

Martin Way Corridor Study Area & Local Context

The MWC spans about six miles, connecting downtown Olympia to the west and JBLM to the east. It runs parallel to I-5 and naturally serves as a traffic relief route.

The corridor serves only a few destinations, including two prominent commercial centers. A relatively unprecedented level of multifamily development has occurred in recent years, primarily in the eastern Lacey section of the MWC.



Located north and south of the corridor are regional destinations, including St Martin's University, the future Lacey Gateway Town Center, and continuing residential growth in the Hawks Prairie area.

Martin Way's central location between all of these regional draws and amenities is expected to improve local market conditions.

Introduction

Vision & Regional Context

Vision. The shared vision for the Martin Way Corridor is as an "attractive mixed-use, high-density residential and commercial area where people enjoy walking, shopping, working and living. Over time, it will transition away from automobile-dominated use to a more pedestrian-friendly streetscape that also encourages bicycling and supports high-capacity transit."

Many cities in the Puget Sound region have experienced the type of development that aligns with this vision. In the Case Studies section, we document some of the efforts that have been made by cities to transition an auto-oriented highway corridor to a mixed-use, more walkable environment.

Regional Context. Proximity to Olympia (the state capital), the military base (Joint Base Lewis-McChord) and I-5 shapes a lot of the land use patterns in the region. The affordability of the area relative to cities closer to the Seattle urban core has attracted significant residential growth in the recent past. Looking forward, the area is poised to benefit further as a less centralized model of employment growth emerges from the pandemic.

Stakeholder Perspectives

Opportunities
Challenges/Barriers to Development

Stakeholder Interviews

Overview

An important step taken at the outset of this process was to interview a set of corridor stakeholders that have experience with real estate, economic development, leasing, and development within the corridor or region.

These stakeholders included developers, brokers, major employers, and other public agency partners. The purpose of the interviews was to gain a better understanding of the local and regional market and explore nuanced observations specific to the Martin Way Corridor.

Based on these interviews, market conditions are generally perceived as favorable for future economic growth and development across the region and within the Martin Way Corridor. The Martin Way Corridor faces similar challenges to that of other former and current highways in secondary or less prominent urban markets, with parcelized, underutilized, and fragmented land use patterns that make redevelopment challenging. The lack of a centralized area of focus exacerbates these challenges.

Stakeholder Perspectives

Opportunities

Residential Demand. Housing of all types, including market-rate, affordable, and student. There is pent-up demand (deficient by about 600 units over the past decade) that is slowly being realized and addressed with new construction. JBLM is experiencing a shortage of housing in the surrounding areas.

Healthcare Expansion. Continuing expansion of the existing healthcare cluster, including Providence and Kaiser, and the diversification of the healthcare industry. Providers are now increasingly taking a holistic, multifaceted approach to healthcare, looking at expanding residential and employment options with a greater lifestyle focus.

Public Improvements. Improvements to Martin Way are likely to improve the likelihood of new businesses and developments to locate on the corridor, but it is unlikely to change the economic feasibility of higher density development.

Redevelopment of Underutilized Property. The high proportion of underutilized properties, particularly in the Tanglewilde-Thompson Place section, might require assemblage for a large-scale redevelopment in keeping with the vision, but land remains at a price that offers a lower barrier to entry for investors. Encouraging redevelopment of existing property will require growth of other amenities, aesthetics, public improvements, and incentives.

Supportive Zoning. Current zoning designations support the vision for the corridor. Zoning is not seen as a barrier to development.

Transitional Corridor. Investors are becoming aware of lower cost locations, such as the MWC. As rents trend upwards of $2 per square foot, higher density development types will start penciling.

Tax Credits. The availability of tax credit or abatement programs are critical for development feasibility. Low Income Housing Tax Credits are available to affordable developers, and Olympia's Multifamily Tax Exemption program (within 250 ft of Martin Way west of Lilly Road) is seen as a highly effective in incentivizing new apartment development. The development community would like to see these tools expanded.

Political Commitment. Public agency commitment to housing. Both Olympia and Lacey have adopted various elements of the Regional Housing Action Plan (HAP).

Favorable Market Conditions. Low interest rates, available land, and rent increases are improving prospects for higher density opportunities, especially nearer Olympia.

Stakeholder Perspectives

Challenges

Challenges or barriers to development can be grouped into one of five categories: physical, regulatory, political, financial, and market-based.

Challenge	Description
Market	• Despite rising rents, construction costs have risen so rapidly that most higher density products fail to pencil, especially vertical mixed use • Slow historic rate of new investment • Difficult to find office tenants; uncertain/unknown office forecast due to the pandemic
Financial	• Market is more cost-sensitive than other geographies in the region; requires an opportunistic approach to development • Recent multifamily development has been on vacant land; most sites on Martin Way require redevelopment • For most of the corridor, the current land use remains more valuable relative to the cost of the land than the potential return on investment for redevelopment.
Physical	• Development constraints limit a lot of areas in the corridor for new development. • Length of corridor; lack of central area of focus • Martin Way has the feel of a highway and is not oriented to pedestrian activity • Lots/sites are typically one parcel deep, which is difficult to redevelop or to build a dense development cluster; much of the corridor is likely to look similar in 20 years from a land use perspective
Regulatory	• Arduous SEPA process for new development; perception of little public agency assistance; many sites are contaminated because of former and current auto-oriented uses. • Permitting process – capacity issues that slow down the entitlement process • Zoning includes minimum density standards that are challenging to meet given current market conditions • CC&Rs typically prohibit mixed-use developments (e.g., Hawks Prairie, Costco area)
Political	• Lack of champions for the corridor • Private-sector and non-profit leadership appear indifferent • Perception of crime, homelessness, and vandalism discourages new investment

Existing Conditions

Demographics
Employment
Regulatory
Development
Transit

Existing Conditions

Demographics

The following pages in this section borrow from the Martin Way Corridor Current Conditions Report. This serves as an important baseline on which to build.

Population. The Martin Way Corridor is home to approximately 9,000 people. Two-thirds live in the area from Pacific Avenue to Marvin Road. One-third live between Marvin Road and Meridian Road, reflecting the density of housing. College Street to Carpenter Road has the fewest residents.

Projected Growth. The population of the corridor is projected to increase significantly over the coming decades, growing to 13,700 by 2045 (growth of 1.5 percent annually). This will drive demand for various amenities, services, and jobs.

Age. The age characteristics of MWC residents is similar to that of Thurston County, with 24 percent of the population aged 19 and under, 31 percent between 20 to 39, 24 percent between 40 to 59, and 21 percent 60 or older.

Income. Residents of the Martin Way Corridor experience higher rates of poverty than is typical in the surrounding communities. Two out of five corridor residents are considered cost-burdened, which means that they spend a high proportion of their income on housing, and one-fifth of households are considered severely cost burdened. These households typically have less income available for transportation, health care, and other needs. Cost-burden and poverty levels are highest in the westernmost section of the corridor, between Pacific Avenue and Lilly Road.

Tenure. The corridor is heavily renter-occupied (56 percent). About half of all corridor residents (49 percent) live in multifamily units and 10 percent live in manufactured housing (there are nine manufactured home parks in the corridor).

TRPC's population estimates indicate that by 2045 two out of three corridor residents (64 percent) will live in a multifamily development, while less than a third (27 percent) will live in a single-family home.

Future development along the Martin Way Corridor is expected to be predominantly multifamily and renter occupied.

Corridor Sections	2017 Pop	2045 Pop	Annual Growth	Total Growth
Pacific - Lilly	1,654	2,831	1.94%	1,177
Lilly - College	1,170	2,122	2.15%	952
College - Carpenter	244	287	0.58%	43
Carpenter - Marvin	2,732	4,302	1.63%	1,570
Marvin - Meridian	3,242	4,167	0.90%	925
Martin Way Corridor	**9,043**	**13,708**	**1.50%**	**4,665**

Source: TRPC MWC Existing Conditions Report

Existing Conditions

Employment

Regional Conditions

Government. Proximity to the state capital contributes to a high proportion of government workers. These jobs are generally more resilient to economic downturns than most. In addition to the statehouse, Joint Base Lewis-McChord borders the eastern edge of Thurston County, and many military personnel live in the region.

Other Sectors. After government, the next-largest sectors in the region are trade, transportation, utilities, and education and health services. Combined, these sectors provide about as many jobs as the government sector. Among trade, transportation, and utilities, nearly three-fourths are retail trade jobs, which have seen a major decline in recent quarters due to the coronavirus pandemic. Leisure and hospitality also makes up a good portion of jobs, and combined with retail trade, the two sectors account for more than 20 percent of the total workforce in the region.

Major Employers. Some of the largest private employers are Providence St. Peter Hospital (1,700 employees), Walmart Supercenter (1,000 employees), Safeway (900 employees). The median household income is significantly higher than the national level, but the region's limited income growth is reflective of these lower-paying sectors.

Education/Talent. A relatively high proportion of educated residents contributes to the above-average incomes here. The metro's percentage of those with a bachelor's degree or higher is greater than that of most small metros in Washington. In addition, Saint Martin's University, a private university in Lacey, enrolls around 1,600 students and employs more than 200 academic and administrative staff members. South Puget Sound Community College (SPSCC) has a campus located in Lacey near St. Martin's and The Evergreen State College. TESC's campus is further away in West Olympia near SPSCC's main campus .

Local Conditions

More than 13,000 people work at locations in the Martin Way Corridor.

The corridor includes a wide range of businesses, including health and medical services, big box retail, small businesses, restaurants and other food services, professional offices, hotels, schools, and government agencies.

The westernmost section of the corridor, Pacific Avenue to Lilly Road, has the greatest concentration of jobs currently, and is likely to see the greatest of number of new positions over the coming decades, while the section from Lilly Road to College Street is anticipated to see the greatest rate of job growth.

In both sections, employment trends are strongly correlated to the continued growth of the health services industry, one of the Thurston County region's strongest employment sectors.

Projected job growth is otherwise distributed evenly across the corridor—as a whole, the corridor is anticipated to gain nearly 6,000 new jobs over the next twenty-five years, an increase of 43 percent over current conditions. This outcome is heavily dependent, however, on the future of employment in the retail and services sectors.

Existing Conditions

Regulatory & Land Use

Physical Conditions. Twenty percent of the corridor remains in a more natural condition—either as forest, wetland, or other open space. Along its length, Martin Way crosses three important stream systems, or watersheds, and cuts through extensive wetlands and other habitat (Indian Creek, Woodard Creek, Woodland Creek). Environmental conditions influence the type of land use that has developed along Martin Way, and in turn these resources are impacted by activity within the corridor. For example, the concentration of wetlands around Ensign Road and in the section of the corridor from College Street to Carpenter Road limits the potential for future development in these locations.

Zoning. Current zoning in the corridor largely corresponds with existing use, with mixed use and commercial zoning directly on Martin Way, low- and mid-density residential zones around the edges, and limited areas identified for open space and industrial use. Nearly half the corridor is zoned to allow a mix of commercial and residential uses (mixed-use) (46 percent). Both Olympia and Lacey have specific high-density zoning designations that correspond to their visions for these sections of the corridor.

One area of discrepancy between current use and zoning are the large portions of the College Street to Carpenter Road section Lacey has zoned as Central Business District, although these areas have remained largely undeveloped.

Based on Leland Consulting Group's understanding of market conditions and input from developers during the stakeholder interviews, zoning is not considered a major barrier to development.

Land Use. Martin Way alternates between areas that are highly urbanized, areas of light development, and areas that are thickly forested and undeveloped. Almost three quarters of the corridor is considered development, albeit at a medium or low intensity.

Land uses in the corridor are diverse, with a wide variety of large and small commercial businesses directly on Martin Way, and low- to moderate-density neighborhoods nestled just a parcel back from the street. Most of the light manufacturing that populated the corridor historically has moved out, leaving just a handful of remaining parcels with industrial uses.

Land Cover Class	Percent Cover
Developed	72%
High-intensity Developed	16%
Medium Intensity Developed	27%
Low Intensity Developed	29%
Developed Open Space (i.e. landscaped parking lots)	8%
Forest	14%
Deciduous Forest	2%
Evergreen Forest	8%
Mixed Forest	4%
Wetland	3%
Other Open Space (Pasture, grassland, cultivated, scrub/shrub, bare land)	3%

Source: TRPC MWC Existing Conditions Report

Existing Conditions

Development

Development Opportunities. The corridor has only a limited supply of remaining vacant land, but the potential for substantial redevelopment of mixed use and commercial areas. The section from Carpenter to Marvin Road has the greatest cluster of parcels with redevelopment potential (100 acres), most of these very high (58 acres)

The section from Pacific Avenue to Lilly Road also has substantial redevelopment potential, but these parcels are more likely to be constrained by wetlands and other critical areas. This section has the greatest amount of vacant land, however, most of this is tied to two parcels along Ensign Road that are zoned as high-density multifamily and currently owned by the Sisters of Providence who founded the Providence St. Peter Hospital, just north of the corridor boundary. The easternmost section of the corridor, Marvin Road to Meridian Avenue, has the least amount of redevelopment potential since much of the development there is newer, though that section does still have some remaining vacant land.

Acres	Pacific - Lilly	Lilly-College	College-Carpenter	Carpenter-Marvin	TOTAL, Martin Way Focus Area	Marvin-Meridian	TOTAL, Martin Way Corridor
Developable Land (Acres)							
Vacant Single Lots	1.0	0.0	0.0	0.8	1.8	0.0	1.8
Vacant Subdividable Land	51.8	15.5	4.6	44.5	116.5	35.4	151.8
Partially Used Subdividable Land	10.3	7.8	0.0	0.0	18.2	3.6	21.7
Subtotal	63.2	23.2	4.6	45.4	39.0	136.4	175.4
Redevelopable Land (Acres)							
Very High	57.2	19.3	11.0	57.8	145.3	12.6	157.9
High	16.6	17.1	5.9	17.3	56.9	5.1	62.0
Medium	20.1	53.4	25.9	24.5	124.0	5.3	129.3
Subtotal	93.9	89.8	42.8	99.5	326.1	23.0	349.1
TOTAL	157.1	113.1	47.5	144.9	462.6	62.0	524.5

Source: TRPC MWC Existing Conditions Report

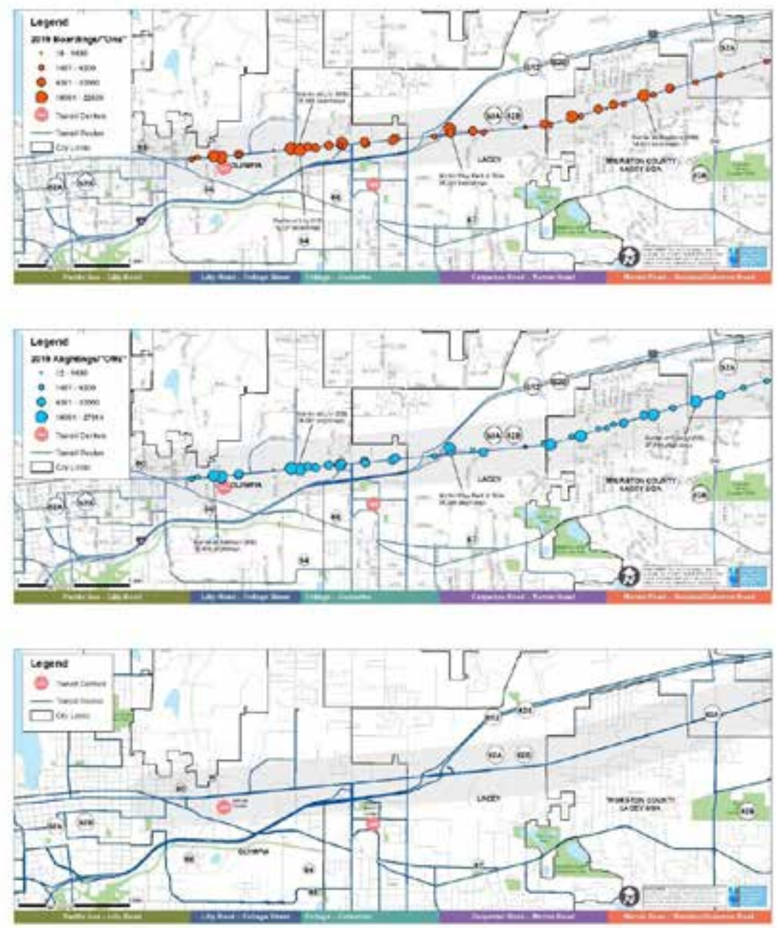
Existing Conditions

Transit

Several routes, including The One, 62A&B, 612 and 620, serve the Martin Way Park & Ride lot, just east of the Martin Way-Interstate 5 interchange (Exit 109). The lot includes 318 parking stalls and sees use seven days a week. In 2019, the lot had an average of 140 vehicles on weekdays and 85 vehicles on weekend days

Martin Way is a priority corridor for Intercity Transit. It accounts for a significant portion of their total ridership and is a critical east-west route for transit users to access a variety of destinations.

A future Bus Rapid Transit line is planned for the Martin Way Corridor. It will connect downtown Olympia and terminate at Marvin Road in the eastern Lacey section of the corridor. This is likely to increase demand for housing in the corridor.



Source: TRPC MWC Existing Conditions Report

Case Studies

Aurora, Shoreline
Bridgeport Way, University Place
Bothell Way, Bothell
68th Avenue, Kenmore

Case Studies

Overview

Case studies serve as an educational tool that can help public agencies understand how similar geographies or markets typically respond to public investments or changes.

For this study, we selected four Washington-based case studies that currently share or previously shared (prior to investments) similar characteristics with the Martin Way Corridor, including the primary arterial's functionality as a highway, the type of planned streetscape or transportation improvements, and status as an outlying or secondary market.

The four selected case studies are:

- Aurora Blvd – Shoreline
- Bridgeport Way – University Place
- Everett Highway – Bothell
- Hwy 522/Bothell Way – Kenmore

Lessons Learned:

- Corridor redesigns have been most successful when there is City ownership, and/or when a City sees the corridor as their "Main Street," and therefore have been willing to invest tens of millions of dollars
- The private-sector land use response to corridor redesign is typically slow. Market conditions, land availability, and the availability of financing tools and incentives are more relevant factors.
- Most of the new construction along highway corridors (current and former) that fits the description of pedestrian-oriented, TOD, or mixed-use has been the result of targeted public investments in land and real estate development.
- Multifamily apartments have dominated the development

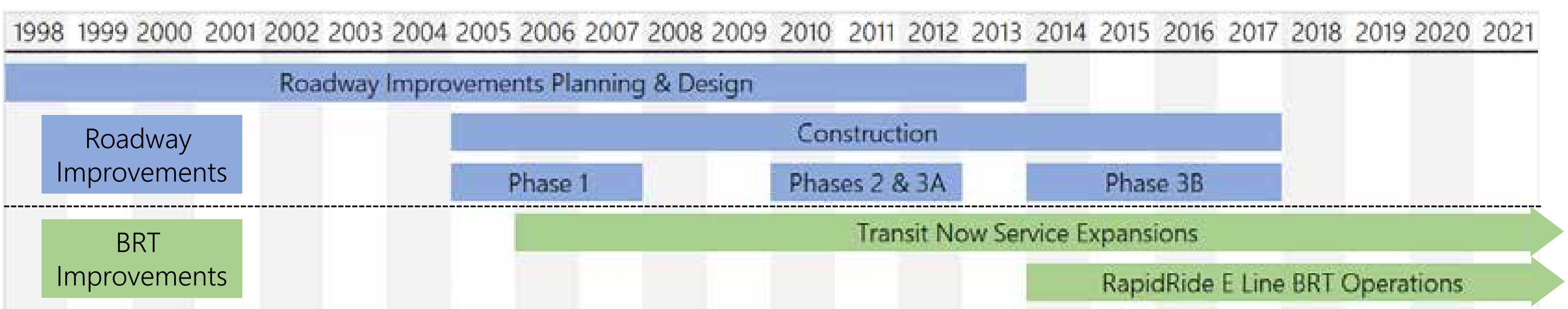
Case Studies
Summary

	Aurora Corridor Shoreline	Bridgeport Way University Place	Bothell Way Bothell	68th Avenue Kenmore
Length of Corridor	3 miles	1.5 miles	0.4 miles	1.7 miles
Time Period of Improvements	1998 – Present (23 years)	1996 – Present (25 years)	2006 – Present (15 years)	1999 – Present (22 years)
Project Elements				
Addition of BRT	Yes	No	No	No
Pedestrian + Bicyclist Improvements	Yes	Yes	Yes	Yes
Zoning or Subarea Plan	?	Yes	Yes	Yes
City-Led Redevelopment Effort	No	Yes	Yes	Yes
Results				
Private Sector Improvements	Yes	Yes – 2:1 private to public investment	Yes – transition to high density uses	Yes

Aurora Corridor

Shoreline, Washington

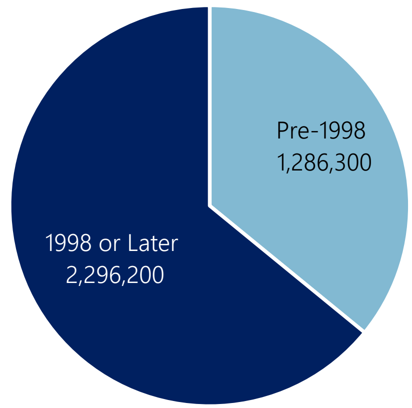
- 3-mile state highway corridor
- Initial goals were to address pedestrian safety deficiencies and improve traffic flow
- Economic development was a secondary goal that became more important in later project phases
- The project has been fully complete for about four years
- BRT service was added in this corridor seven years ago



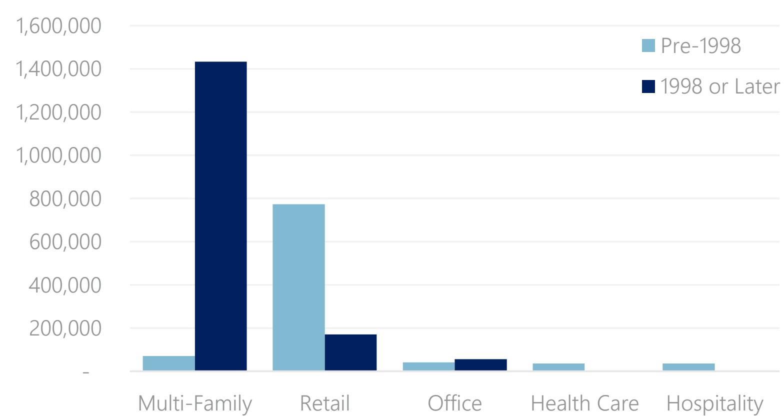
Aurora Corridor
Shoreline, Washington

- 36% of development square feet took place prior to the roadway improvements that began in 1998
- 64% of development took place after roadway improvements began in 1998
- The majority of the corridor's retail development was built prior to 1998
    - About 775,000 square feet
- Since 1998, the bulk of development has been apartment developments
    - Nearly 2,000,000 square feet
- 190,000 square feet of retail, office, industrial, and one multifamily building dating from the 1950s to 1980s were demolished

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021

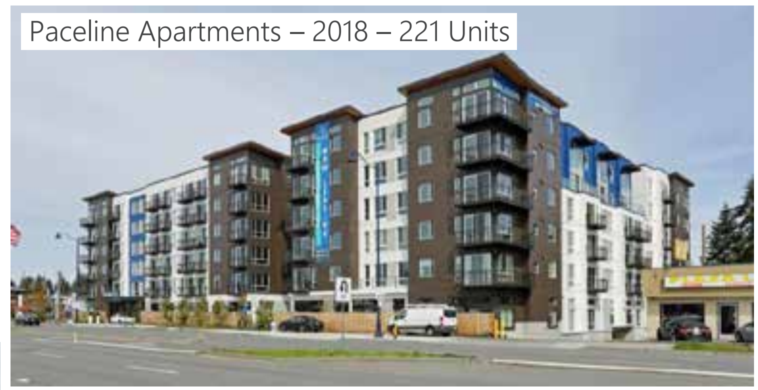


Aurora Corridor

Shoreline, Washington


The Current Shoreline - Under Construction – 330 Units

June 2015 Streetview


Paceline Apartments – 2018 – 221 Units

June 2019

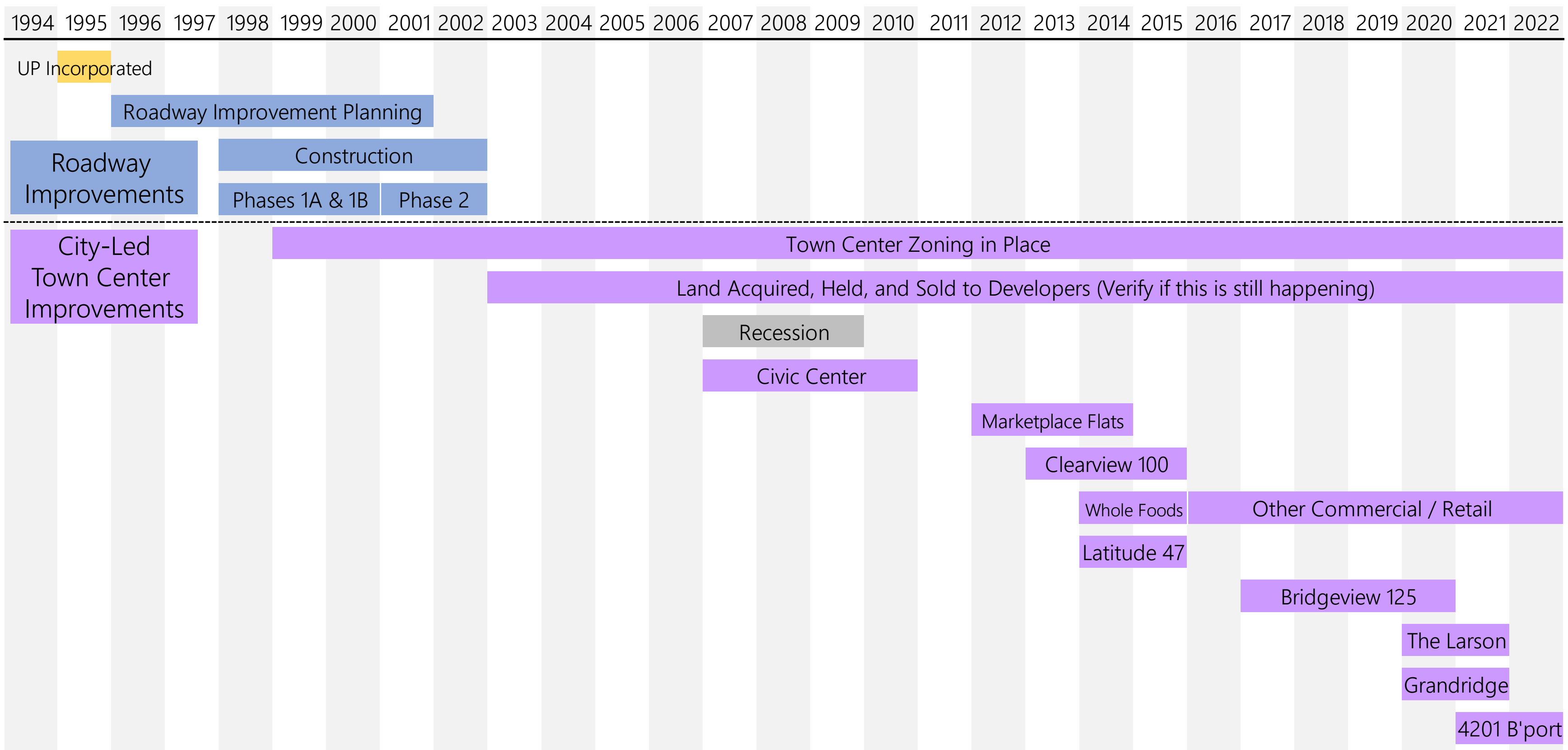

Costco– 1993 – 254,000 Square Feet

Bridgeport Way
University Place, Washington

- 1.5-mile state highway corridor
- Initial goals were to add sidewalks and increase pedestrian and driver safety
- Includes a substantial Town Center component
- The City of University Place not only completed corridor redesign, it also acquired 22 acres of property, built a parking garage, and conducted public-private partnerships (PPPs) to bring in Whole Foods, 500 housing units (3 projects), a new City Hall and library, plaza, etc.
- Most redevelopment is nodal (Town Center)
- Estimated $270 - $320 million in private investment from Town Center development
- Private market has not been catalyzed into action: about $2 in private investment for each $1 in public investment (Kevin Briske)

Bridgeport Way

University Place, Washington

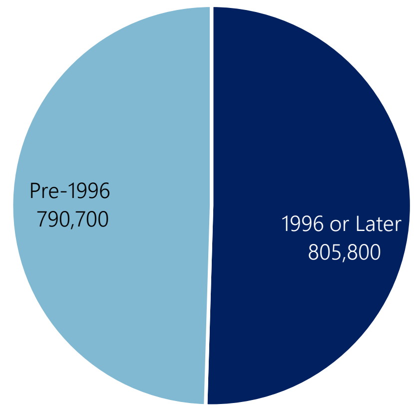


Bridgeport Way

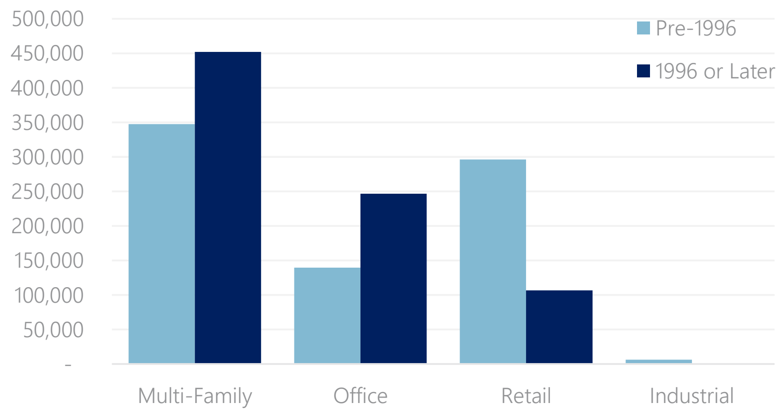
University Place, Washington

- 50% of development square feet took place prior to the roadway improvements that began in 1996
- 50% of development took place after roadway improvements began in 1996
- Similar to the Aurora Corridor, more of the corridor's retail development was built prior to 1996
- Since 1998, multi-family and office development are more prevalent than they were before 1998
- 65,500 square feet of retail and office buildings dating from the 1960s to 1990s were demolished

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021



Bridgeport Way

University Place, Washington


September 2007 Streetview


November 2018


Bridgeview 125 - 2020 – 125 Units


Latitude 47 – 2015 – 170 Units


Clearview – 2011 – 155,000 Square Feet

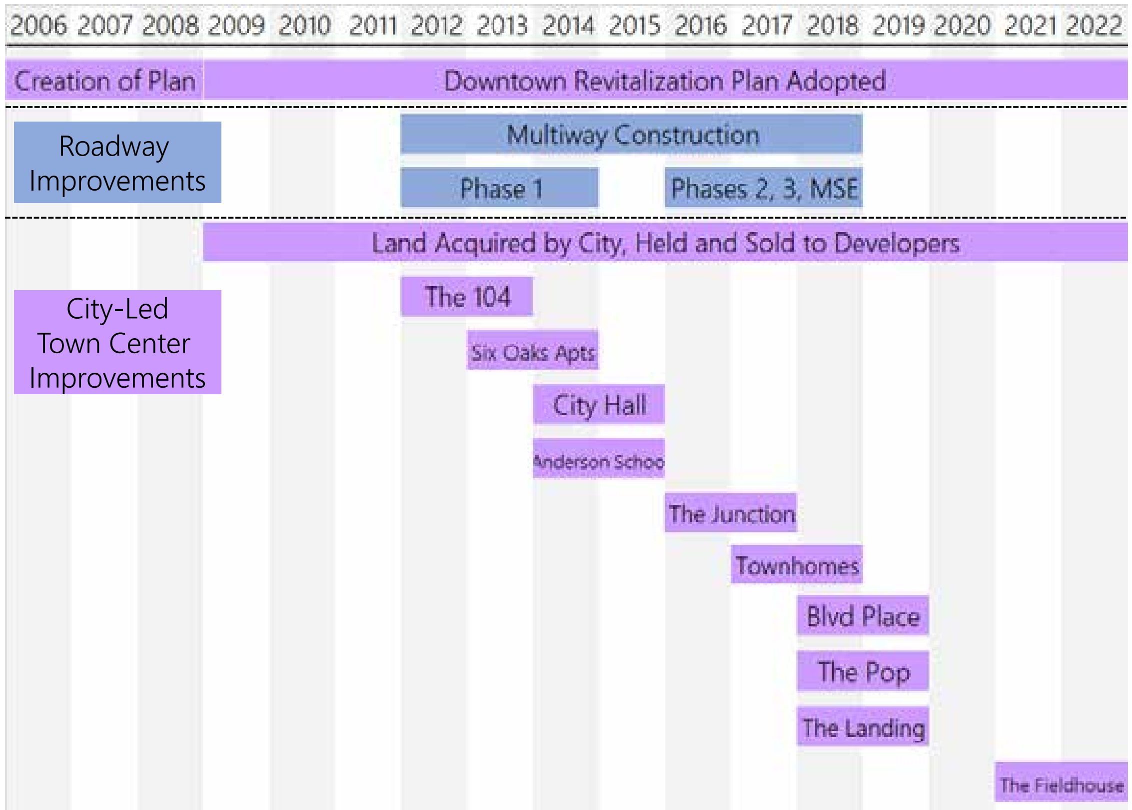
Bothell Way

Bothell, Washington

- 0.37-mile former state highway corridor
- Goal was to transform downtown portion of Bothell Way into a "multiway boulevard" with parallel outer roadways for slower vehicles, pedestrians, and bicyclists
- City bought 20+ acres of land for the purpose of creating a downtown
    - Components include:
        - City Hall (2015)
        - Multifamily
        - Townhomes
        - Hospitality
- Total downtown area shown here totals 45 acres

Bothell Way

Bothell, Washington

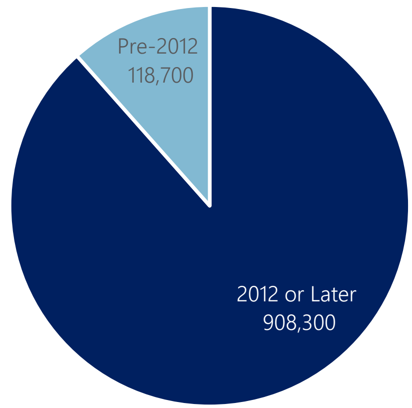


Bothell Way

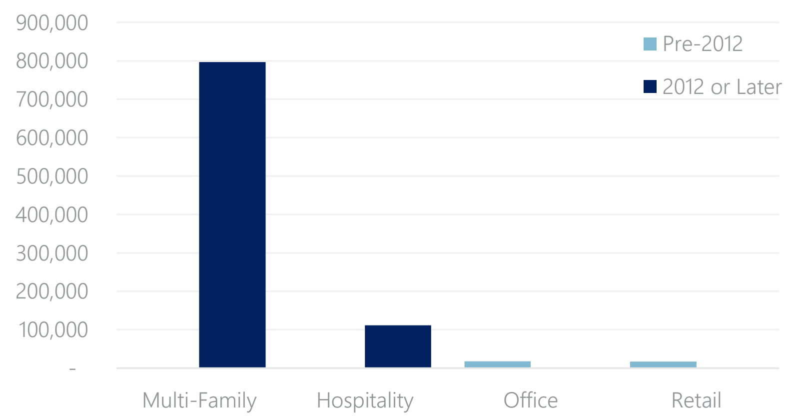
Bothell, Washington

- 12% of development square feet took place prior to the roadway improvements that began in 1996
- 88% of development took place after roadway improvements began in 1996
- 95,000 square feet of buildings constructed during the 1940s to 1960s were demolished for new development (not included in pie chart)
- Similar to the other case studies, retail (and office in this case) was built prior to the roadway improvements and city-led development efforts that began in 2012
- Since 2012, the bulk of development has been multi-family, with a small amount of hospitality. There are parcels available for commercial development, but no new retail or office has been built since 2012.

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



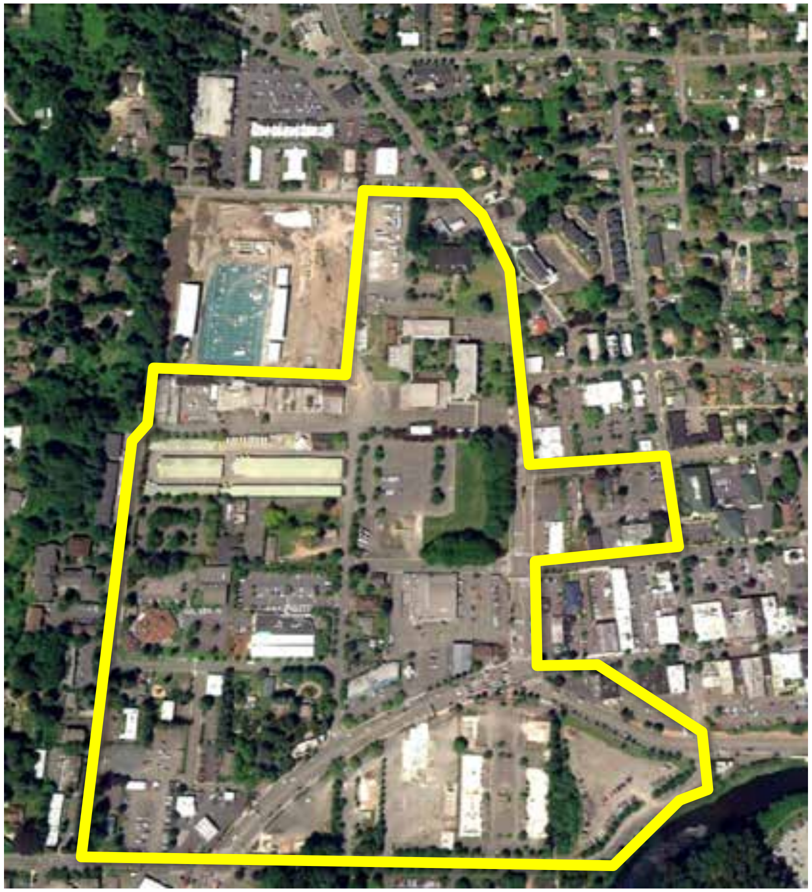
Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021



Bothell Way

Bothell, Washington

June 2010



August 2020

Bothell Way

Bothell, Washington


November 2015 Streetview


June 2019 Streetview


Six Oaks - 2014 – 203 Units


The Junction – 2018 – 130 Units


Anderson School Hotel – 2015 – 72 Rooms

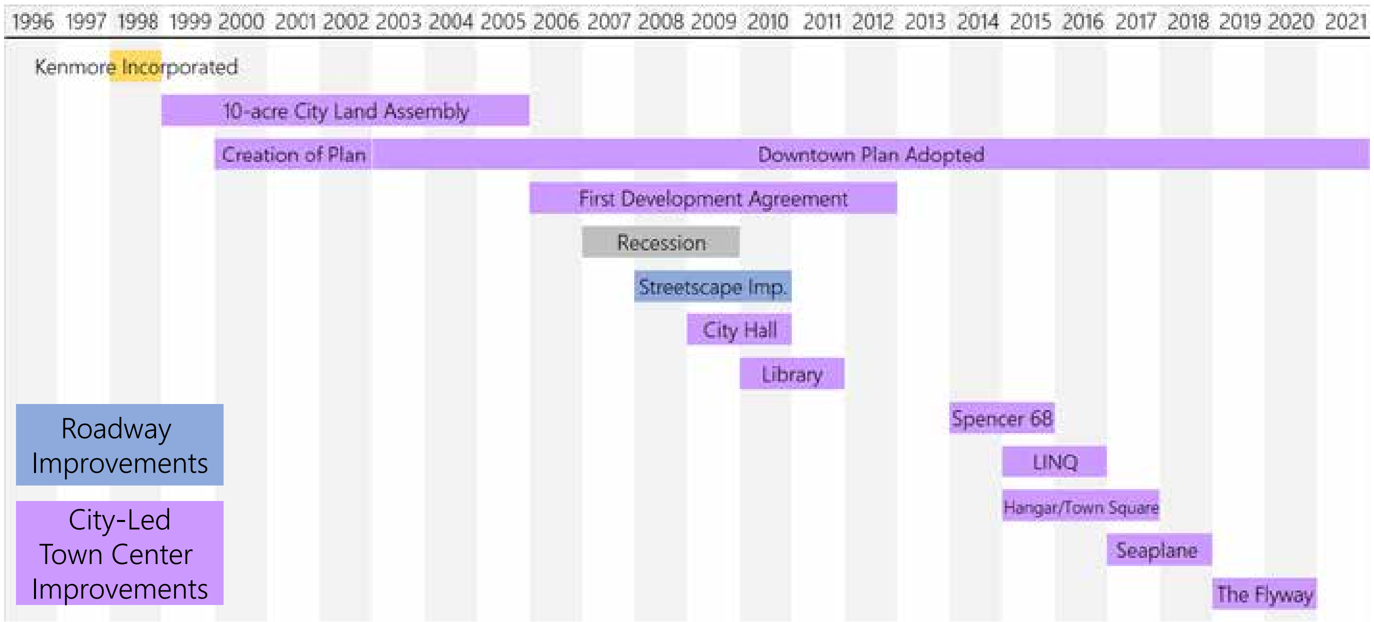
68th Street

Kenmore, Washington

- 1.7-mile state highway corridor + 0.2 mile local street
- Goal was to add pedestrian facilities and create a downtown
- City acquired 9.6 acres of land for the purpose of creating a "downtown"
  - Components
    - City Hall (2010)
    - Library (2011)
    - Hangar/Town Square (2017)
    - Multifamily
    - Restaurant
- Total downtown area shown here measures 10.7 acres

68th Avenue

Kenmore, Washington

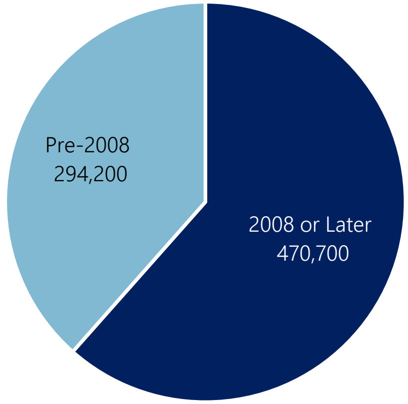


68th Avenue

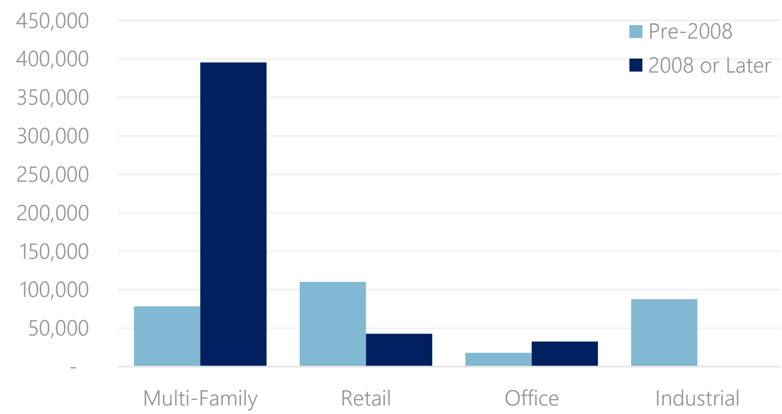
Kenmore, Washington

- 38% of development square feet took place prior to the roadway improvements that began in 2008
- 62% of development took place after roadway improvements began in 2008
- 46,300 square feet of buildings from the 1960s – 1970s were demolished for new development (not included in pie chart)
- Similar to the other case studies, more retail (and industrial in this case) was built prior to the roadway improvements that began in 2008
- Since 2012, the bulk of development has been multi-family

Square Feet of Development
Pre- and Post-Roadway Improvements
Costar, 2021



Types of Development by Square Feet
Pre- and Post-Roadway Improvements
Costar, 2021



68th Avenue
Kenmore, Washington


August 2011 Streetview


October 2018 Streetview


LINQ - 2017 – 94 Units


The Hangar & Town Square – 2017


The Spencer 68 – 2015 – 222 Units

Market Conditions

National & Regional Trends
Local Market Overview
- Opportunities
- Challenges
- Development Character
- Focus Areas

National Trends

Overview

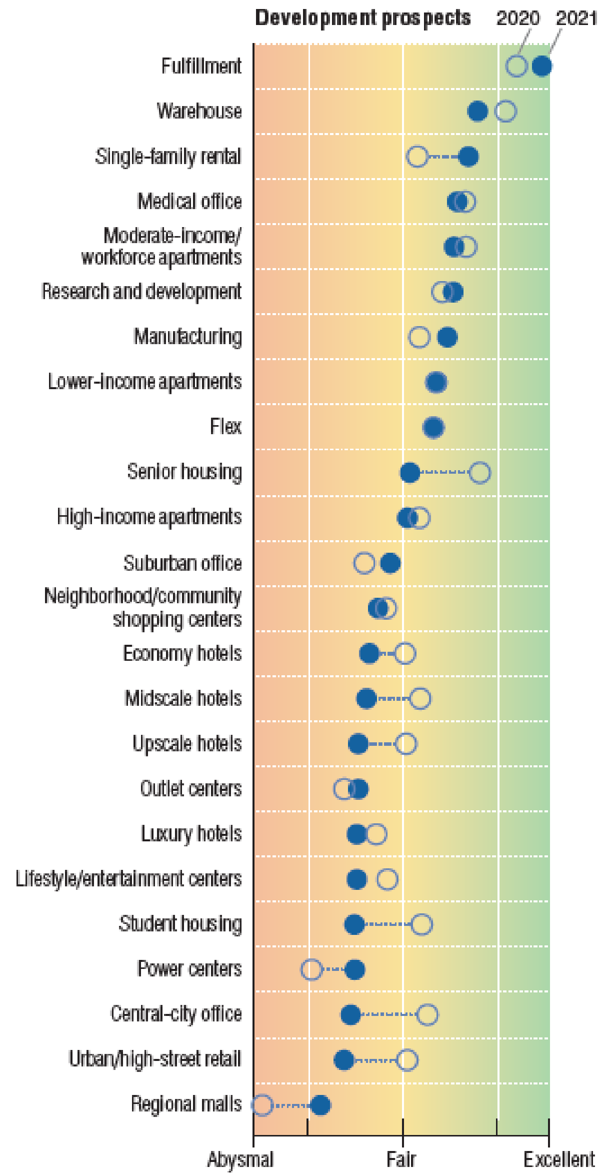
The figure at right from the Urban Land Institute's annual Emerging Trends publication displays the development prospects for a variety of land uses in 2020 and 2021. Industrial, medical office, and housing products are considered the most promising development types.

The ongoing COVID-19 pandemic is one of, if not the most significant market disrupter for many decades. It has impacted the market in a number of ways, including:

- Increasing pent-up demand for housing (rental and owned) as a result of a constrained supply
- Increasing demand for suburban or outlying locations as people seek housing options in more affordable areas that provide access to recreational opportunities

There were several trends that had emerged pre-pandemic that are set to continue as the recovery ensues. These include:

- E-commerce's increasing market share of retail (ecommerce increased by 30% during the pandemic) and the continuing fall of regional malls.
- Demand for experience-based commercial (retail and employment)
- Rising demand for health services and senior housing product as the population ages



Source: ULI Emerging Trends

Martin Way Corridor Study | Market Study

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Regional Development Trends

Market Area

Development along the Martin Way Corridor is impacted by the surrounding area, including downtown Olympia, JBLM, and Hawks Prairie.

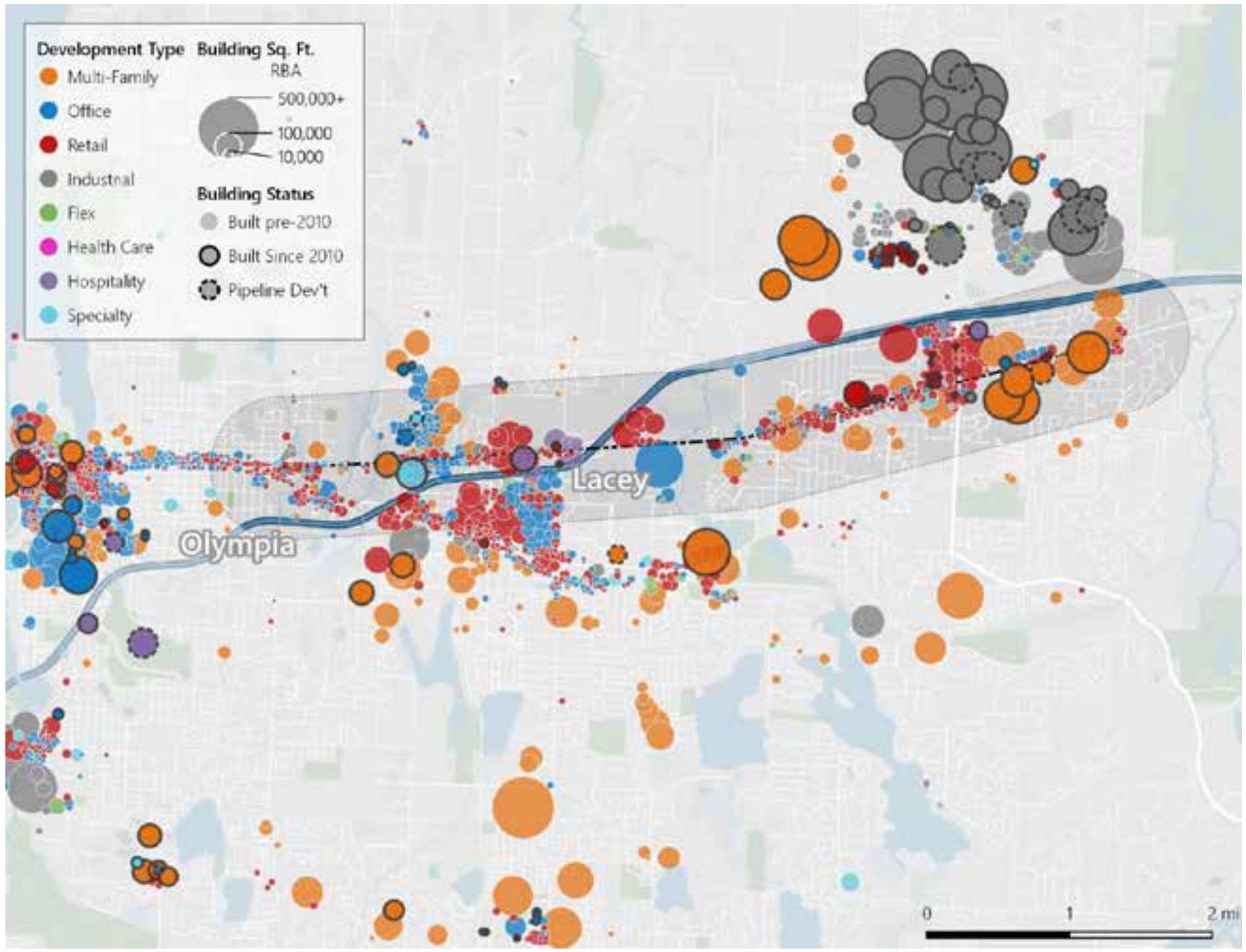
Housing development has seemingly occurred in tandem with this growth. New multifamily apartments have featured heavily in the Martin Way Corridor, accounting for 66 percent of all new development since 2010.

Clusters of **retail** space are primarily located near the corridor's I-5 interchanges.

Office space and healthcare uses are almost entirely located in Olympia.

A substantial amount of **industrial** development has occurred to the northeast of the corridor, bringing major employment growth.

Hotel development, including a new project, has clustered near College Street.



Source: Costar

Regional Market Trends

Multifamily Residential

The national multifamily market stabilized in early 2021 after a 2020 that saw weakening market dynamics. Seasonality, widespread vaccinations, an improving economy, additional fiscal stimulus and a return of office workers will all contribute to further multifamily market improvement.

The regional market shows positive indicators for new development. Regional population growth over the past decade has been robust, largely thanks to the economic resilience of the Puget Sound region and high levels of inflow migration from those priced out of larger cities. During a time when office-using employees can work from anywhere, lower priced markets like Olympia and Lacey have benefitted. The primary competition for apartment development for the Martin Way Corridor is Downtown Olympia and further south along Ruddell Road and Yelm Highway.

Vacancies have remained tight at less than five percent over the past few years, even with a protracted wave of new development. An influx of renters from bigger cities during the pandemic has created a strong demand base for apartments. Rent has historically been lower than the national average, but rents have grown swiftly over the past decade due to relatively tight vacancies. Rent growth has maintained strong levels despite the pandemic.

The region benefits from relatively consistent renter demand as a result of the high proportion of blue-collar workers, government employees, students, and a younger-than-average population. There are several colleges in the area, including St Martins in Lacey. Local colleges have long been a perennial source of rental housing demand, but the transition to distance learning could soften absorption in areas that cater to students. Over a longer timeframe, the ageing population is expected to increase demand for senior housing products.

Prior to the pandemic, investors targeted the Olympia metro market due to these steady demand drivers and relative affordability to nearby Seattle. Sales volume since then has slowed though, due in part to the implementation of the graduated real estate excise tax (REET) in January (according to some developers) and a pullback in investment as a result of economic uncertainty.

Construction has surged recently. The market area has experienced a construction surge, with 2,200 units opening over the past five years and 140 units under construction (reflecting one-quarter of total inventory). Development activity has mostly been focused on garden style apartments in Lacey and Olympia proper (outdoor-style complex up to three stories in height—i.e., low rise—and usually have parking surrounding the complex in surface lots). Notable recent deliveries include The Wolff Company's 240-unit Martingale, which opened in Lacey in early October 2020. Projects under construction include the 48-unit Mulberry Place near Lacey. This garden-style community is set to open in mid-2021 with a unit mix that contains mostly one-bedrooms, a relatively new phenomenon in the Olympia market.

Local Market Conditions

Recent Multifamily Development

Of the 14 new projects built in the last five years or currently under construction, six have been multifamily. Only Merritt Manor is in Olympia, the other five are clustered in Lacey. Images from each project are included at right in the order each project is listed in the table.

Each of these projects are low-density (3-4 story), surface parked (versus a structured parking garage), and wood-framed construction. This is considered the cheapest construction type. Market-rate rents for new projects are upwards of $2.00 per square foot, which is considered an important threshold for increasing the feasibility of higher density (and more expensive) projects. However, this recent rent growth has been outpaced by the rapidly increasing cost of construction.

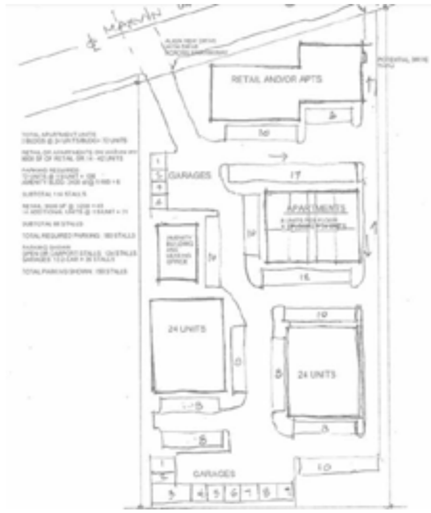
Project Name	No. Units	Year Built	Rent Type & Avg. Rent Per Square Foot	Lot Acres	Units per Acre
Merritt Manor	82	2020	Affordable ($1.22 PSF)	5.72* (2.95)	27.8
Martin-gale	240	2020	Market ($2.17 PSF)	32	21.4
Revel Lacey	135	2018	Independent Senior Living	6.66	20.3
The Marq on Martin	248	2017	Market ($2.06 PSF)		20.6
Copper Wood	228	2017	Affordable ($1.09 PSF)	9.66	23.6
8819 Martin Way	96	Under Constr.	Market	3.54	27.1

Source: Costar

Development Example

Gayteway Apartments

Address	**8819 Martin Way**
Units	96
Uses	Market-rate Apartments
Acres	3.54
Density	27 units per acre
Parking	120+ surface
Zoning	MHDC



Development character is consistent with recent multifamily construction (3-story, surface parked)

- Original application included potential ground floor retail, highlighting the potential challenges of mixed-use development in the MWC.
- Site plan reflects minimum lot acreage needed for similar development types
- Sold in June 2018 for $1.5 million ($9.7 per square foot); $15,600 per door

Anecdotal evidence from developers indicate that land must now cost $10,000 to $15,000 per door in order for projects to pencil.

Year	Building Value	Land Value	I:L Ratio
2021	$0	$1.31m	0
2020	$522,600	$1.34m	0.39
2019	$395,000	$1.36m	0.29
2018	$439,200	$1.15m	0.36

Site conditions during at sale (2018):

Market Trends

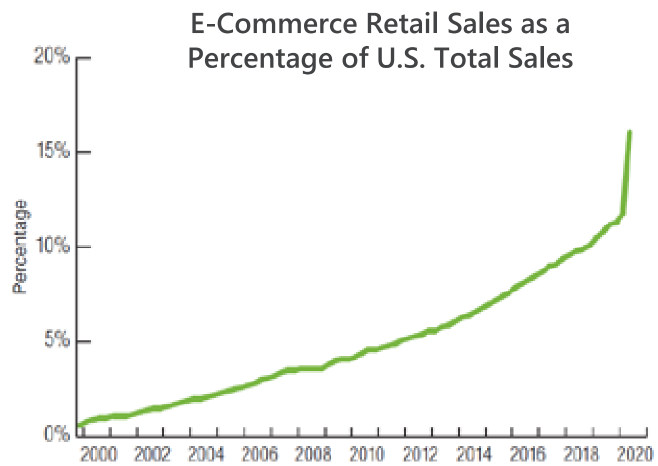
Retail

National Trends. The commercial real estate environment, and particularly the retail sector, remains uncertain thanks to the pandemic and ecommerce's ever-increasing share of the market. It is probable that retailers will continue to face turbulence for the foreseeable future, impacting demand, rent growth, and capital markets in the process.

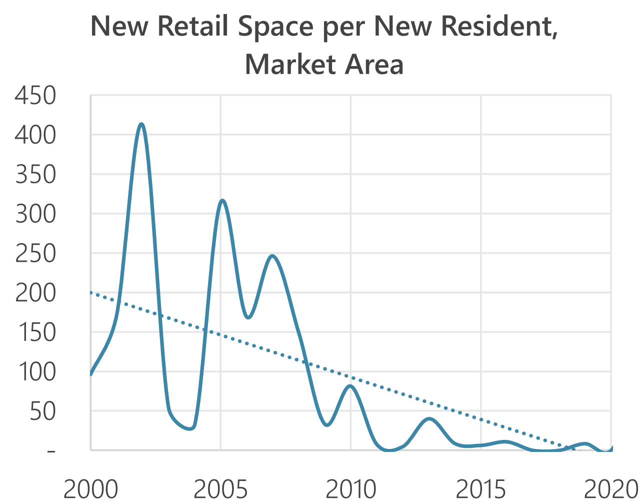
Regional Trends. The market area contains 6.1 million square feet of retail space. Retail space per new resident has been steadily declining for the past few decades, averaging about 200 square feet of new space in 2000 to practically zero in 2020. While approximately 100,000 square feet of new space is proposed in the corridor over the next few years, this trend is set to continue as consumer habits shift and ecommerce captures an increasing share of the market.

Local Trends. The Martin Way Corridor is dominated by two main retail centers: the South Sound Center (Woodland District) and Hawks Prairie Village Mall and the nearby big box centers, all in Lacey, which includes Walmart, Costco, Best Buy, and Home Depot. Despite the aforementioned challenges, each center is considered strong performers with few vacancies, relatively high average rents, and national credit tenants. Rents generally average between the high $20s to the high $30s per square foot. Based on LCG's understanding of the market—supplemented by stakeholder interview findings—demand is expected to continue for quality retail with strong anchors in eastern sections of the corridor, especially as residential growth continues in the region.

However, there are few locations along the corridor that could accommodate this type of development—nor does it fit with the vision for the MWC. New commercial spaces in mixed-use buildings may be feasible as market conditions improve. These tenants may include foodservice or drinking establishments, medical offices, or small professional or financial services.



Source: U.S. Census Bureau



Source: Costar, ESRI

Market Trends

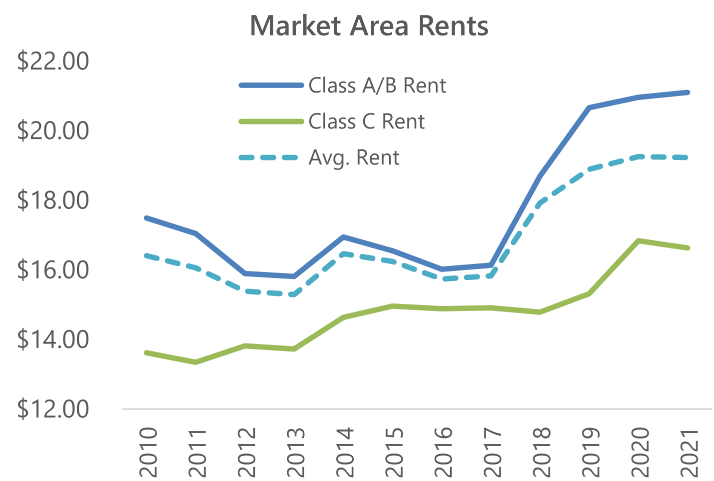
Office

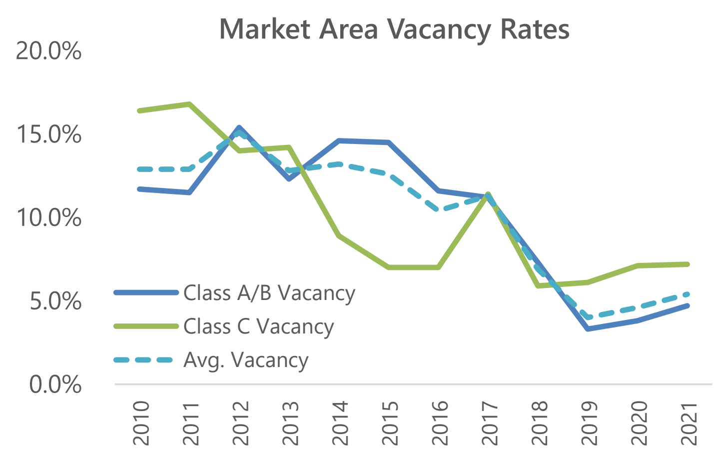
National Trends. With continued easing of pandemic-related occupancy restrictions, flexible space options are increasingly becoming a key component of companies' short- and long-term strategies for returning their workforces to the office. The rise of remote working over the past year has greatly accelerated the acceptance of flexibility in terms of where and how employees will work. This may include allowing employees to work outside of the traditional central office location and from certain satellite locations nearer their homes.

Regional Trends. The local office market, which includes medical office, totals 3.1 million square feet of inventory. Downtown markets remain disproportionately impacted by the COVID-19 pandemic, although the Puget Sound region's office employment, which is concentrated in the tech industry, is relatively insulated from long-term employment loss.

Local Prospects. While the office outlook is unclear, trends suggest a more positive outlook for local office prospects in the Olympia-Lacey market area, particularly given the stability that the government and healthcare sectors bring. While rents in older, more dated buildings have stagnated, rents for newer Class A/B space (which typically possess the highest-quality amenities, construction, access, and management) experienced significant growth between 2019 and 2020. There is only one Class A office space in the Martin Way Corridor—a 28,000 square foot medical office building on Lilly Road that was built in 2006. All office deliveries over the past 20 years have been Class A and B.

New development is likely to cluster near existing developments in the western sections of the Martin Way Corridor, especially near the existing healthcare cluster.





Market Trends

Hotel

National trends. Nationwide annual hotel demand dropped by 37% in 2020, with U.S. hotels suffering the worst annual occupancy level in 2020 since the Great Depression in the 1930s. Social distancing continues to constrain group demand and convention hotels suffered the greatest declines in profits because of the slowdown in office-using employee travel. Leisure travelers remain the most dependable source of demand for U.S. hotels.

Regional trends. Almost every hospitality metric available show historic lows for the Southwest Puget Sound due to the COVID-19 Pandemic. Occupancy rates are hovering just over 50 percent, average daily room rates are about $84, revenue per room is about $48. None of these read well for new hotel prospects. Because of the risk and cost involved with hotels, they are usually a "follow-on" use. Hotel investors look for areas experiencing significant growth in high-income industry sectors, major tourism destinations, or other unique differentiators. Investors utilize STR (a data benchmarking company) reports to gauge the hotel market, and typically look for an occupancy rate of at least 70 percent across a spectrum of hotels.

The hotel industry is expected to bounce back as workers return to offices and business and leisure travel resumes. As the industry recovers, new investments will be made in proven locations with robust employment or tourism. Proximity to the state capital, JBLM, and substantial new employment growth in Hawks Prairie will likely drive long-term demand for hotels in the region.

The Martin Way Corridor is dominated by economic lodging with a limited number of midscale product. Demand for luxury and upscale lodging is typically limited to downtown environments or mixed use, walkable locations.

Market Trends

Industrial

National Trends. The national industrial & logistics market had its strongest year on record in 2020 despite a pandemic that caused a severe economic downturn. Tenants moved into facilities in droves to serve a rapidly growing online consumer base and increase their safety stock to avoid inventory disruptions that plagued the past year. All types of occupiers increased their presence in big-box last year to serve growing populations, be near expanding logistics hubs, and take advantage of new government incentive programs.

Regional Trends. The Puget Sound's industrial market is among the strongest in the nation, with growth fueled by the e-commerce, energy and life sciences companies that is delivering above-average returns for investors. Building values, land prices and rents are steadily increasing.

Local Opportunities. While the Martin Way Corridor could capitalize on these trends due to its proximity to I-5 and accessibility to major growth markets, these development types do not fit within the vision for the corridor. These developments also require large, vacant, flat tracts of land, which are unavailable in the corridor. We expect, the Hawks Prairie area, however, to continue to see major development of this type, creating many jobs and thereby generating additional demand for a variety of housing options, amenities, and services.

Local Market Conditions

Recent Commercial Development

Of the eight commercial projects built since 2015 along the Martin Way Corridor, two were self storage facilities and three were drive-through fast food restaurants. Two of the eight were built in the Olympia section of the corridor, including the Hampton Inn (top image). Most developments are single-story and surface parked, which is reflected by the low floor-area-ratios. These ratios are not reflective of a mixed-use, pedestrian-oriented environment.

Only one office building has been built—BioLife Plasma Services—a purpose-built medical development toward the eastern section of the corridor, reflecting the lack of office market strength.

Project Name	Sq. Ft.	Year Built	Development Type	Lot Acres	Floor Area Ratio
Olympia & Lilly Storage	127,000	2019	Self Storage	2.16	1.35
Hampton Inn, Olympia	85,500 (121 rooms)	2016	Hotel	4.26	0.46
Kingham St Pad Site	3,800	2016	Retail (multi-tenant)	0.82	0.11
BioLife Plasma Svcs	16,700	2016	Office	1.43	0.27
Lacey Self Storage	12,000	2019	Self Storage	3.76	0.07

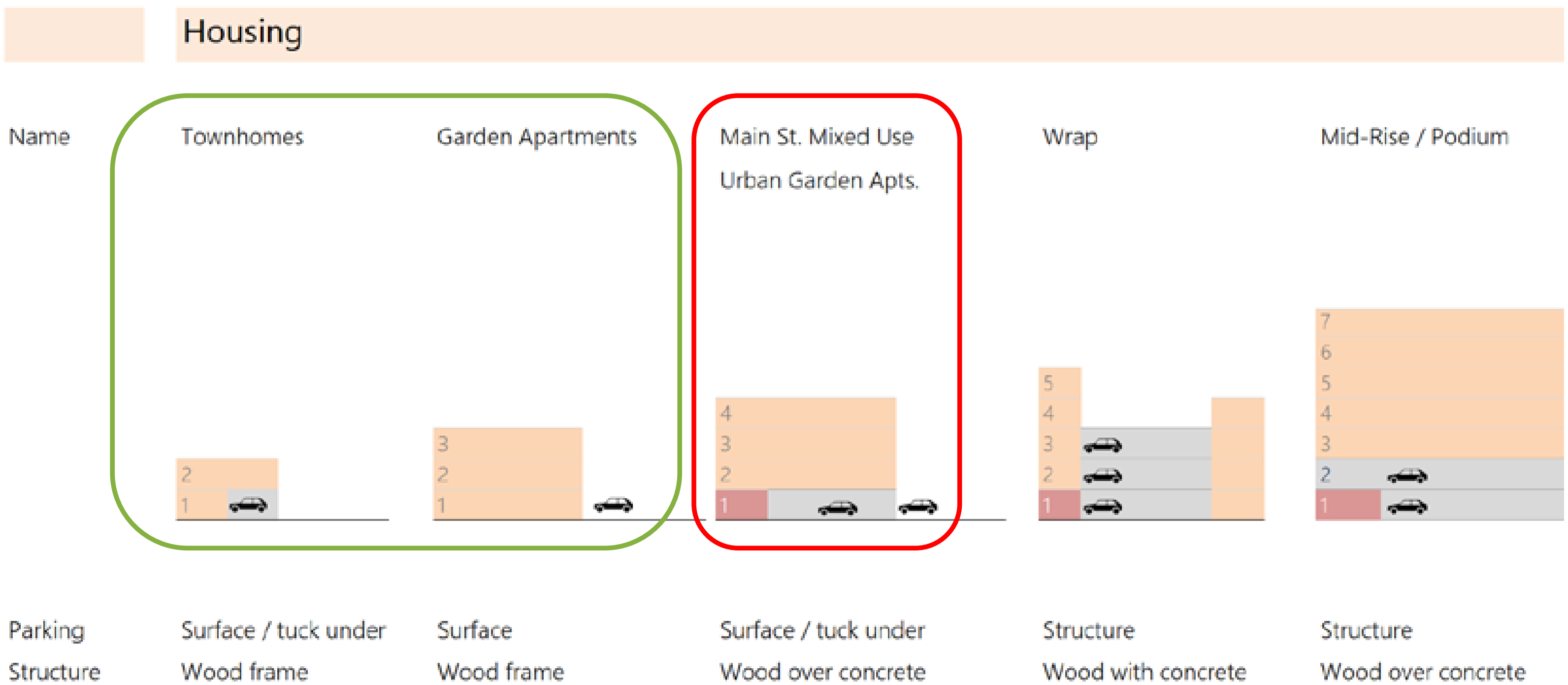
Source: Costar

Land Uses & Development Character

Housing Prototypes

Much development is built within a series of "prototypes." The way in which parking is provided (surface, tuck under, or structured) is a key influence on the physical form of these projects. Typical housing (multifamily) prototypes are shown below.

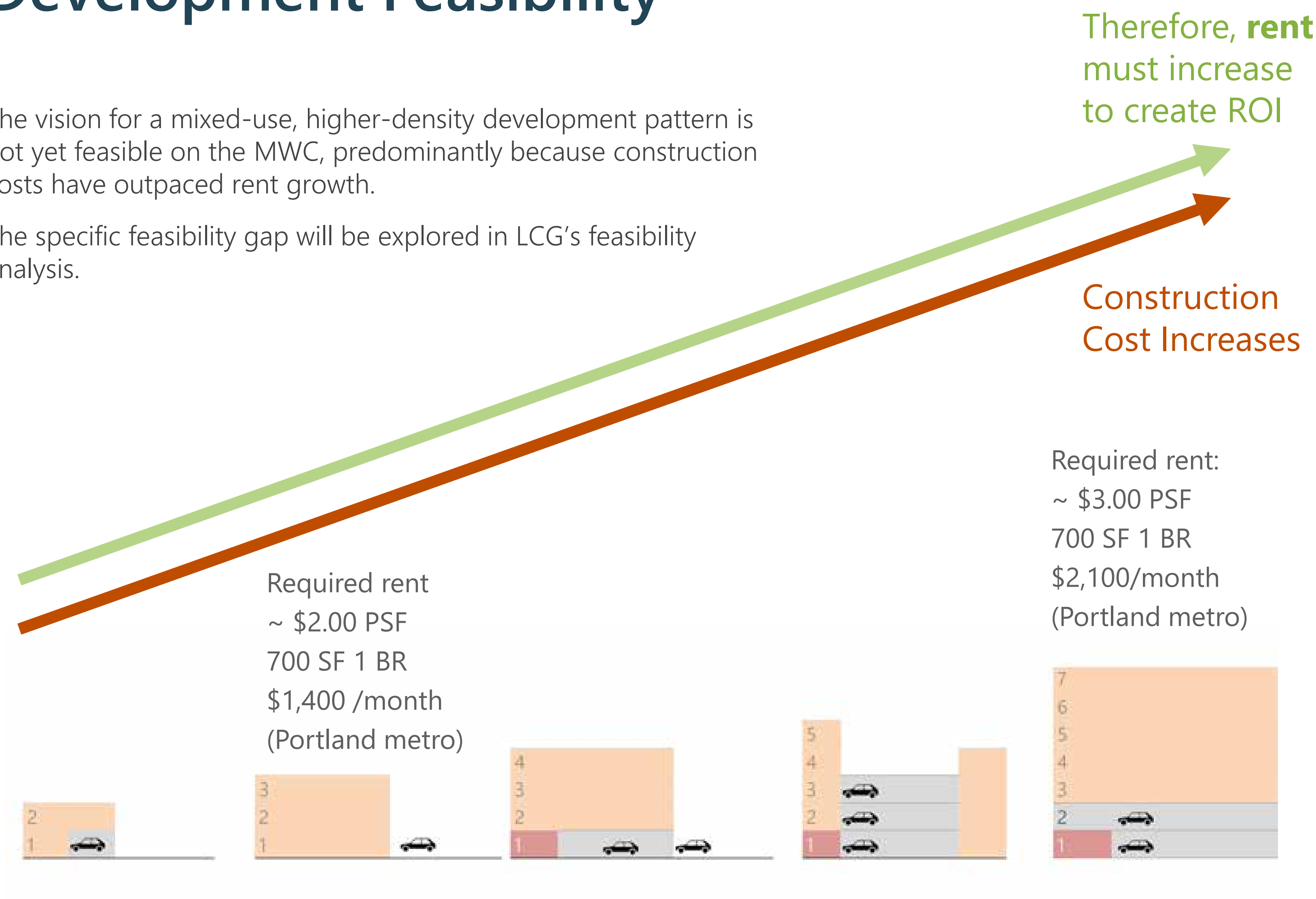
Development in the Martin Way Corridor has been consistent with Townhomes and Garden Apartments. Interviews with area developers indicate market momentum towards a Main Street Mixed Use development type, but only with public funding assistance or incentives.



Development Feasibility

The vision for a mixed-use, higher-density development pattern is not yet feasible on the MWC, predominantly because construction costs have outpaced rent growth.

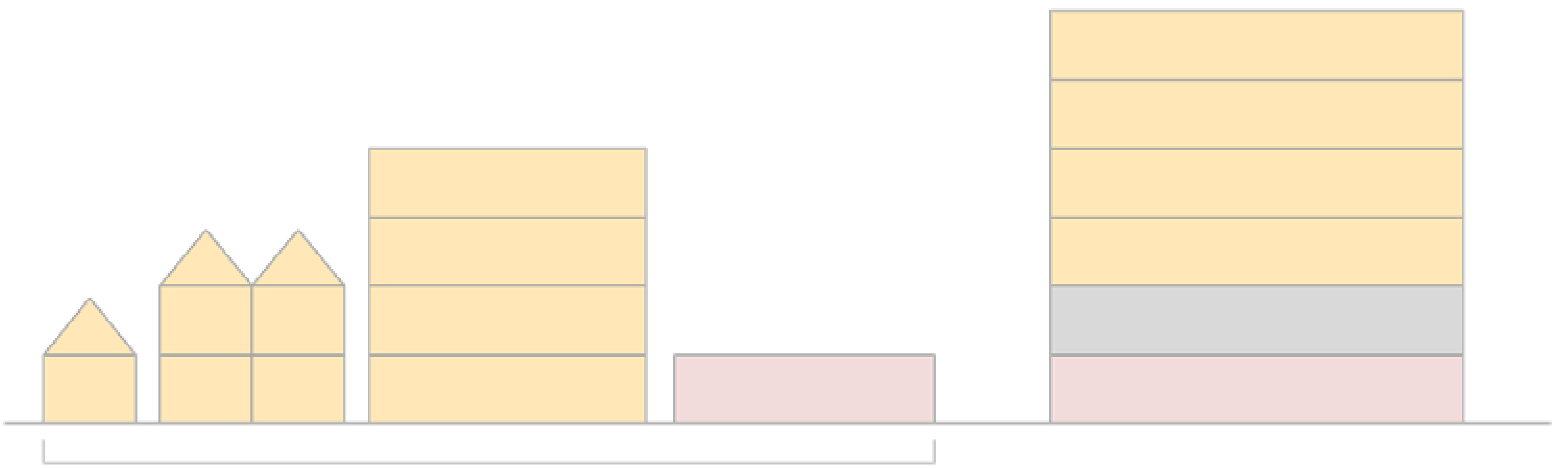
The specific feasibility gap will be explored in LCG's feasibility analysis.



Types of Mixed-Use Development

Less expensive

More expensive



Horizontal Mixed-Use

Residential and commercial uses
are mixed across the site, but not within buildings

Vertical Mixed-Use

Residential and commercial uses
are mixed within buildings

Structured parking

Structural Elements:
Concrete podium/PT slab

Elevators

Circulation/interior stairways

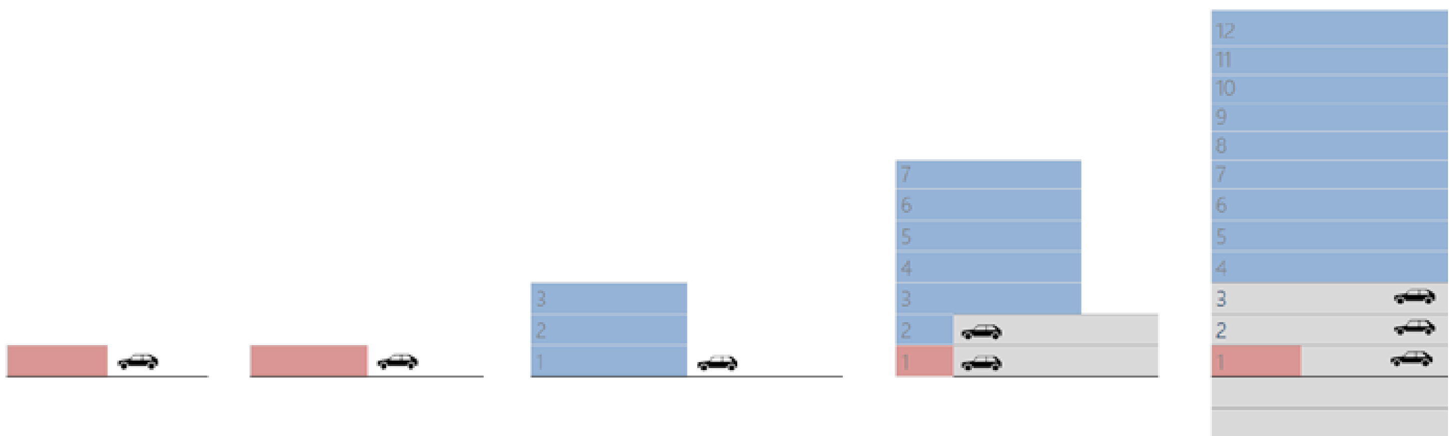
Fire sprinklers and plumbing

Additional A/E and professional fees

Commercial Prototypes

Typical retail and office prototypes are shown below. Like the housing prototypes, the way in which parking is provided (surface, tuck under, or structured) is a key influence on the physical form of these projects. For single-use retail projects, there may be new construction or rehab/renovation of existing retail/commercial buildings, since there are many of these buildings in the MWC and rehab is a likely type of development.

	Retail / Commercial		Office		
Name	Rehab	New Construction	Creative Office	Mid Rise	High Rise
Parking	Surface	Surface	Surface	Structure	Structure
Structure			Steel and concrete	Steel and concrete	Steel and concrete



Opportunity Sites

Development Opportunity Sites

In LCG's experience, cities are best served by selecting specific areas to focus investments. Areas that are likely to transition the most in keeping with the vision for the corridor include nodal areas (i.e., where major roads intersect) that contain one or more major development opportunities.

Leland Consulting Group identified six nodal areas of activity along the Martin Way Corridor.

The criteria for development opportunities sites include:

- Vacant or highly underutilized sites
- Larger than two acres
- Contiguous ownership
- Known investment properties

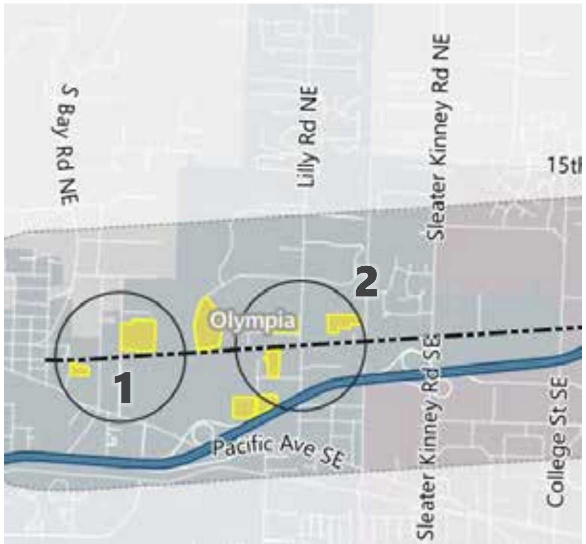
In Olympia, the combination of recent and planned private investments—particularly in housing and healthcare—and the need for improvements to the right-of-way, make Lilly Road a suitable candidate.

In Lacey, Martin Village is the major redevelopment opportunity, although it is unlikely to see the necessary private investment for full-scale redevelopment. More on this in the following pages.

In the unincorporated area of Tanglewild-Thompson place, Carpenter Road presents an opportunity for major redevelopment projects, especially if annexed into Lacey.

In the eastern section, recent development and upcoming projects have accounted for most of the vacant sites, although a few vacant sites remain unaccounted for.

Sites: Olympia



While wetlands and natural areas are prevalent in this section and hinder development prospects the nodal area surrounding the intersection of Lilly Road and Martin Way has the highest density of both construction activity and development opportunities.

Several development projects are in the pipeline on existing vacant sites (not shown in the map at left). These include:

- An affordable 82-unit apartment project called Merritt Manor recently opened on the old Bailey Inn site just west of Stoll Road. A second phase of the project is understood to be market-rate, six stories tall, and contain structured parking. While it would be the first of its type along the corridor, the project is currently only conceptual and at least two years away from breaking ground. Its completion and success will provide a realistic depiction of market feasibility for similar developments in the future.
- Immediately south of Merritt Manor is another proposed market-rate apartment project called The Mulberry. Another 50+ unit market-rate apartment project is proposed in an undisclosed location.

Thurston County parcel data shows land holdings by several potential developers and indicates that private sector investments in the corridor are likely to continue increasing in keeping with the trends of recent years (as long as development is feasible).

The area between Nodes 1 and 2 is owned by Providence, who indicated a desire for development that would be in keeping with "Health Care 2.0." In LCG's opinion, this may include a mix of uses that provide housing or retail amenities for staff and customers.

Sites: Lacey (West)

Martin Village is a 33-acres in the central part of the corridor (#3). It is adjacent to 10-acre park and ride and includes a Regal Cinema, a former Sears (currently vacant), retail pad sites along Martin Way, and a Burlington clothing store.

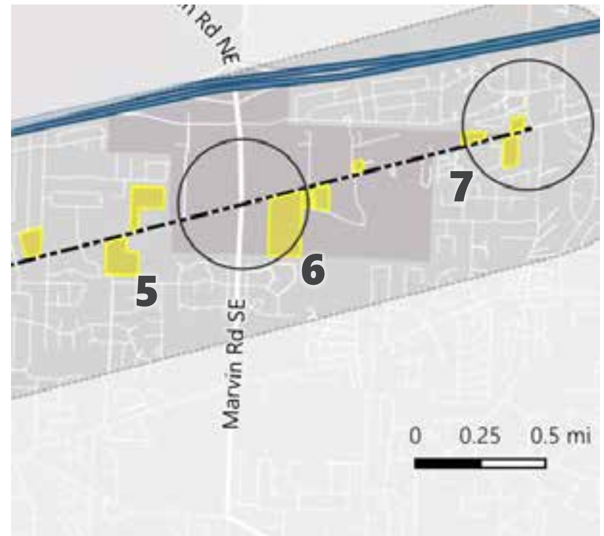
Visibility from I-5 is low and its isolation relative to other uses in the corridor make it a challenging site for brokers to re-tenant. As a weak performing center, the site may be a candidate for reuse or redevelopment. While mall redevelopments can often take advantage of consolidated landownership patterns and a sophisticated set of financing and regulatory tools, Martin Village has at least eight different property owners and CC&R restrictions are likely in place that limit redevelopment. Prospects are therefore likely very long term and require public acquisition and/or funding assistance.

The Carpenter Road Node offers more readily developable opportunities (#4). Land is zoned CBD and supports higher density uses. At the southwest corner of Martin Way and Carpenter is a 3.1-acre site within the City of Lacey; other sites are on unincorporated land. A 2.5-acre parcel owned by Thurston County offers up the potential for a joint venture or disposition strategy.

While not fronting on, or within 0.25 miles of Martin Way, the 50+ acre gravel pit presents a significant opportunity for a major redevelopment project in the future. Many examples of gravel pit redevelopments have occurred throughout the state, and most include a mix of uses, including residential, retail, office, and recreation.

Sites: Lacey (East)

The eastern section of the corridor is dominated by shopping centers north of Martin Way along Marvin Road. While this area might appear like a prime infill opportunity because of the low-density environment and surface parking lots, the covenants, conditions, and restrictions (CC&Rs) that are implemented by retail property owners highly restrict development prospects. These centers are currently strong performers.



South of Martin Way and sharing a property line with the newly constructed Marq Apartments, there is a vacant 20-acre parcel (#6) owned by the Washington Department of Natural Resources. While plans for this site are unknown, if any, it is one of the few large vacant sites in this section of the corridor. Recent multifamily construction, proximity to the future Bus Rapid Transit route and nearby retail services, and access to several major employment growth areas, make this site highly attractive as a housing or mixed-use development. There are also two adjacent smaller (1-2 acre) sites fronting Martin Way.

On a related note, the future terminus of the Bus Rapid Transit route improves prospects for higher density development. However, in LCG's experience, transit is not a major driver of redevelopment; rather it is added value.

There are two "flag" lots in unincorporated Tanglewilde (#5). These sites are considered long-term redevelopment prospects given the industrial character of the surrounding area.

At the study area's eastern terminus (Meridian Rd, #7), there are three developable sites that surround the recently constructed Copper Wood Apartments. Housing and neighborhood-scale retail are appropriate in these locations.

Conclusions

Conclusions

Key Takeaways

Nodal Development. There is not currently a central focus of investment in the corridor. Select locations are on the cusp of transitioning into a moderate density environment. Focusing attention to specific nodes with major development opportunities can give rise to a suburban town center typology—a mixed-use hub that offers entertainment, apartments, and offices.

Development Timing. Market conditions along the Martin Way Corridor still only support surface parked development typologies. The corridor is in transition, however, and may begin to see higher-density developments with a mix of structured and surface parking. From an investment perspective, opportunities include low interest rates, land availability, and rising rents. However, construction costs are expected to continue increasing at the current record pace, so it may take many years before this actually comes to fruition.

Housing. Demand is expected to remain strong for residential uses, particularly apartments. Pent-up demand, among other factors, has driven rents to levels that we believe are on the cusp of supporting higher density development types. The Martin Way Corridor is now a proven market for wood framed, walkup apartments but remains unproven for higher density or mixed-use developments with more experience construction types and structured parking.

Retail. While the Martin Way Corridor is saturated with retail space, particularly general merchandise and big box retailers, opportunities exist to promote smaller, independent retailers and restauranters that provide amenities and services to local workers and residents. Focused investments to the Martin Way streetscape and specific nodes may result in aesthetically pleasing public space and land uses that attracts new tenants.

Office. Office prospects are likely limited for the foreseeable future. Employment growth is expected to continue in the industries of government, healthcare, and warehousing and transportation. Government and healthcare-related office will likely be limited to Olympia in select locations. Professional and financial office may occur as part of mixed-use developments further to the east in the future.

Industrial. The vision for the Martin Way Corridor does not align with the current opportunities and trends in industrial development (big box warehousing and distribution). However, incremental improvements—particularly in the Tanglewild-Thompson area—to existing light industrial properties will likely have modest impacts on market conditions throughout the corridor.

Conclusions

Strategies and Tools

There are several strategies and tools available to cities to improve market conditions and support development that is in keeping with the vision for the corridor. Some tools are in place already and may be expanded, and others are yet to be implemented. This page provides a brief summary of the tools and strategies we will further explore in later tasks of this project.

Tax Credits provide a develop an incentives to construct specific housing types in targeted areas.

- The Low Income Housing Tax Credit program (LIHTC) provides a tax incentive to construct or rehabilitate affordable rental housing for low-income households.
- The Multifamily Tax Exemption (MFTE) currently exists in the western Olympia section of Martin Way and provides an eight to 12-year tax exemption on the building value of eligible housing projects. The program currently stops at Lilly Road.

Bonuses and Waivers. Cities can decide to waive certain fees for certain development types or award bonuses (density, parking) for including certain components.

Public-Private Partnerships (PPPs). PPPs do not have to be big joint ventures; cities can also agree to fund or construct infrastructure improvements that may be prohibitively expensive for developers. Partnerships with local colleges and healthcare institutions may provide additional opportunities.

District-wide funding tools. Tax Increment Financing is currently being debated by the State Legislature.

Placemaking. Public space, plazas, trails, and sidewalks are critical public investments for mixed-use environments. Local governments may need to construct the sidewalks and bike lanes through the critical areas rather than expecting development to build that infrastructure (since there won't be development in those areas).

Phasing. Developing large sites can often be done in a way that limits the need to take significant financial risks upfront. Infrastructure should be built incrementally and flexibly, using a variety of funding sources and financing tools.

Property Acquisitions and Land Banking. As land prices increase, rent growth may not be enough to cover the feasibility gap of higher density development types. Land banking (purchasing and holding land in order to preserve land for desired development types that might not yet be feasible) is one strategy to consider.

Housing Action Plans. Both Olympia and Lacey are in the process of looking into potential future actions or have already adopted a variety of strategies to encourage a range of housing options.

- Olympia has identified land write-downs (discounted land prices for city-owned property), density and height bonuses, streamlining the permitting process, revising development standards, lowering impact fees, and reducing minimum lot sizes
- Lacey's HAP recommendations are borne out of its affordable housing strategy to streamline affordable housing development.

Identify Private and Nonprofit Champions. Often these entities and individuals are able or willing to take more risks for a lower return on investment and can therefore enter the market with lesser needs.

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